

Diocese of Westminster Education Service

Academies Briefing Paper

31st January 2017

1. Since the Academy Strategy & Policy launch meeting in December a great deal of work has been done to make the Diocese “Academy Ready”. The Harrow & Watford Family of Schools meeting took place at St John Fisher Catholic Primary School in Harrow on 23rd January. This meeting was attended by over 40 representatives from every school in this proposed CAT family. The Education Commission has approved the roles and responsibilities of the Project Board, who are to oversee the programme, with the view to protect, secure and develop Catholic education. There have been numerous visits to schools, governing bodies, meetings with professional associations, meetings with education support services, financial consultants and legal services. The feedback from schools at Deanery meetings has allowed concerns and areas for clarity to be addressed. Much of the preliminary work has been started; however, a great deal has still to be done.
2. The majority of our schools have viewed the proposal as a positive step towards addressing the challenges all schools are facing. There are a minority of schools that are less favourable about certain aspects of the policy, but remain engaged in the ongoing dialogue. However, the majority of schools wish to explore every possibility and opportunity this process may bring to their school or college. The vast majority have engaged locally with a view to seek clarity and reassurance at every step to ensure the way forward benefits their community, the common good and the Catholic family of schools.

The purpose of this paper is to highlight the following and:

- To publish the various Family of Schools introductory meetings. We welcome the Chair, Headteacher and School Bursar to attend this initial meeting;
- Introduce the work and remit of the Project Board & the members of this Board;
- Introduce the work and remit of the CAT Headteachers’ Working Party and its membership and the work and remit of the CAT Governors’ Working Party and its membership;
- Finally, the Education Service has received many written questions seeking clarity in various aspects of the Academy process and there was a common thread among them all. Those questions have been replied to in this document.

Timeline for Family of School Meetings Spring 2017

| Family of School | Host School for Meeting | Date & Time of Meeting |
|---|--|--|
| Family 4: Richmond, Hounslow & Surrey | St Edmund's Catholic Primary School, Whitton | Monday 20 th February at 4pm |
| Family 6: Brent | St Joseph's Catholic Primary School, Willesden | Monday 27 th February at 4pm |
| Family 9: Hackney & Tower Hamlets | Cardinal Pole Catholic Secondary School, Hackney | Monday 6 th March at 4pm |
| Family 7: Camden & Islington | Our Lady Catholic Primary School, Camden | Wednesday 8 th March at 4pm |
| Family 1: St Albans | Nicholas Breakspear Catholic Secondary School, St Albans | Monday 20 th March at 4pm |
| Family 10: Barnet | Finchley Catholic High School, Barnet | Wednesday 22 nd March at 4pm |
| Family 3: Harrow & Watford | St John Fisher Catholic Primary School, Harrow | Monday 27 th March at 4.30pm |
| Family 5: Ealing & Hillingdon | Cardinal Wiseman Secondary School, Ealing | Wednesday 29 th March at 4.30pm |
| Family 11: Enfield & Haringey | St Anne's Catholic Secondary School, Enfield (Palmer's Green site) | Wednesday 19 th April at 5pm |
| Family 8: Kensington & Chelsea, Hammersmith & Fulham & Westminster | Sion Manning Secondary School, Ladbroke Grove | Monday 24 th April at 4pm |
| Family 2: Lea Valley & Stevenage | St Margaret Clitherow Primary School, Stevenage | Tuesday 2 nd May at 5pm |

The Project Board

In order to deliver an efficient service to schools and colleges it was agreed by the Education Commission to have four key components in the work undertaken by the **Project Board – Standards; Talent Management; Project Management; and a Common Policy Framework.**

Following the work undertaken by the Education Service and the CAT Headteachers' Working Party, it was agreed that any proposed Academy model must include a framework for developing and maintaining academic excellence and ensure sustained support for standards at all levels.

The challenge all schools face in recruiting and retaining staff also needs to be addressed. The Project Board will explore opportunities to shape a talent management system to identify the best possible strategies to recruit teachers into Catholic education and develop new opportunities to attract candidates into senior leadership positions.

In order to help and support those schools who wish to become Academies, the Project Board will oversee a project management team to help provide the due diligence required to successfully join a CAT. This includes:

- A detailed plan which will be prepared for each school, setting out who needs to do what by when;
- Two meetings with Governors, including drafting the resolutions that need to be made by the GB with preparation of documentation in advance;
- Two meetings with the Head-teacher / SLT / staff, with preparation of material in advance;
- Ongoing support to make sure activities identified as the responsibility of the school, or the lawyers, or a third party, happen, including for example registrations, TUPE, set up of finance system, registration with exam boards and all opening documentation, including strategic liaison with Local Authority and Diocese;
- Setting up and running the Section 10 consultation exercise (including drafting the letter / material ensuring compliance, chairing events, collating feedback and preparing the report);
- An overview of requirements, a draft letter to commence the consultation period, a draft presentation for the consultation meeting, a set of FAQs to use at the meeting, a draft letter to close the consultation period, the report to be drafted on behalf of the school, and a resolution provided to the GB accordingly.

As CATs develop it is important that a common policy framework is secured to ensure consensus of delivery at a local level and at diocesan level to achieve the very best economies of scale

The Project Board consists of: members of the Education Commission; legal services; DfE representative; academic leaders from St Mary's University and project management services. They will meet monthly to focus and deliver the establishment phase and implementation phase of each new hub / family of schools.

Chair: Bishop +John Wilson

Commission Members: John Asgian, Martin Rainsford, Kate Griffin & Fr Michael Dunne

Diocesan Officers: Paolo Camoletto, JP Morrison

St Mary's Officers on Standards & Talent Management: Prof Anne Moran, Sir Michael Wilshaw

Project Management: Louise Robinson, ARCADIS

Legal: Vicki Hair, Browne Jacobson

Common Policy Framework & Compliance: Teresa Doyle, DoWAT Secretary

DfE: Joe Farrell, Senior Executive Officer in the DfE Academy Division

The Project Board will focus on the following:

STANDARDS

- Identify with St Mary's University the leading consultants for school improvement services;
- Review proposals from current providers and analyse impact on teaching and learning. Ensure high quality tendering is introduced and best value for schools is achieved;
- Develop the expertise from current Teaching Schools in securing high quality intervention work and sustained development that is measurable and achievable;
- Provide opportunities within Families of Schools (FoS) to share expertise and liaise with those who seek or require help and support.

- In conjunction with the CAT Headteachers' Working Party shape how best to provide the very highest support in standards and attainment across all schools.

TALENT MANAGEMENT

- Recruitment of Foundation Directors for the CAT.
 - Agree job description in conjunction with the CAT Governors' Working Party
 - Agree recruitment procedure
 - Search, select and recruit Foundation Directors
- Create and support CAT Boards and develop advanced training in conjunction with the CAT Governors' Working Party
- Develop a Catholic Leadership programme
 - Identify potential leaders
 - Expand professional CPD opportunities
 - HT support network
 - FD support network
- Further develop the culture of the Diocesan Family

PROJECT MANAGEMENT

- Develop and assess key metrics required for joining a CAT
 - Financial
 - Educational
 - Capital investments
- Review legal property titles
- Develop and agree on boarding procedures
- Create the CAT
- Support each school in joining an academy
 - Address changes to policies and suppliers
 - Ensure training and understanding of the governing function
 - Ensure property titles are correct and accurate

COMMON POLICY FRAMEWORK

- Review and recommend legal construction and oversight of CAT
- Regulation of Policies
 - Choose the policies which should be regulated first
 - Get consensus on policy
 - Issue policies
- Purchasing
 - Develop list of expenses that can benefit from economy of scales
 - Develop network, alliances and consensus of product
 - Conduct OJEU processes
- Develop the Financial Structure of the overall diocesan family
 - Collect and analyse Financial Information from Schools

- Understand cost structure and where potential savings could be made
- Analyse structure for School Building Fund
- Continue with Bursars' Forums

Across the CATs there will remain our shared vision. Catholic schools contribute to the formation of the whole person according to high standards of intellectual, moral and physical excellence whilst building an understanding of the principles of social teaching, human dignity, community and participation, care for creation, dignity in work, peace and reconciliation and solidarity. This enables our students to move through all of the phases of their education to take their place in the adult life.

Our shared vision will continue to be delivered through four key areas:

SCHOOLS WILL BE SUPPORTED

- To work in partnership with all Catholic and local education partners for the common good;
- To build the total capacity of Catholic education across the Diocese through sponsorship and partnership;
- To challenge member schools to provide outstanding academic Catholic education;
- To promote an inclusive environment to recognise and enable those who often remain invisible, through ethnic or cultural disadvantage, or through disability or poverty;
- To ensure our CAT Family of Schools have a particular vocation to the least advantaged to enable them through education to change their lives;
- To discharge their legal responsibilities as academies within the principles of subsidiarity and solidarity.

SCHOOLS WILL BE ENCOURAGED TO BE INNOVATIVE

- To become champions and establish partnerships for exchanging best practice and initiatives;
- To create a culture of innovation at all levels of the organization to promote outstanding education and academic excellence with a focus on nurture and achievement across our CATs Family of schools;
- To develop a shared responsibility for creating collaborative communities of learning across each CAT and the Diocese;
- To develop a School Improvement Strategy to deliver educational excellence for all students through mutual support and challenge.

SCHOOLS TO BE REGULATORY AND COMPLIANT

- To develop a range of policies across the CAT Academy Boards to discharge their legal responsibilities within the principles of subsidiarity and solidarity;
- To develop a clearly defined strategy and criteria for accepting new member schools including pre-decision information and a defined transfer / induction process;
- To interpret National regulations and guidelines as required for member schools;
- To deliver outstanding and strong corporate governance across the CATs.

SCHOOLS TO BE FINANCIALLY ROBUST

- To deliver a quality provision across our schools whilst achieving economy; efficiency and effectiveness;
- To establish informed, accountable, and ethical decision-making for policy development and resource management;
- To be transparent in the delivery of the charitable objectives of the Trust in the use of the grant funding available the CAT;
- To ensure staffing structures are value for money whilst retaining the efficiency and effectiveness of the CAT;
- To deliver a simple, efficient low cost organisation across the CATs.

The CAT Governors' Working Party

- **Kevin Rylett**; St Michael's Catholic Secondary School, Garston, Herts & NLG
- **Kerry Sullivan**; St Mark's Catholic Secondary School, Hounslow
- **Margaret Harvey**; Our Lady's Catholic Primary School, Camden & St Aloysius Catholic Primary School & NLG
- **Alloysius Frederick**; St Gregory's Catholic Secondary School plus one other & NLG & Chair of All Saints Trust.
- **Alison Gartlans**; St Michael's Catholic Grammar School
- **Paul Lasok**; St Joseph's Catholic Primary School, Islington & NLG
- **Teresa Nunn**; Sacred Heart Catholic Primary School, Islington & NLG
- **Maggie Pound**; Cardinal Wiseman Catholic Secondary School, Ealing & NLG
- **Jaqueline Byrne**; DfE official and school governor at St John Fisher Catholic Primary School
- **Jim Coyle**; Sacred Heart Catholic Secondary School, Harrow & NLG
- **Dr Gwynneth Flower**; Our Lady of Victories Catholic Primary School, Kensington & Chelsea & NLG
- **Janet Stribbling**, Diocese of Southwark & NLG

The remit of this group who meet monthly is the following:

1. What do we think governance for the future of our schools should look like?
2. What will actually make a difference and how do we measure that difference?
3. What level of support do we need to bring in?

The CAT Headteachers' Working Party

- **Juliette Jackson**; Executive Headteacher at St Eugene de Mazonod Catholic Primary School, Our Lady's Catholic Primary School, Camden Town, St Mary's Kilburn Church of England Primary School and St Michael's Church of England Primary School, Camden Town;
- **Dawn Titus**; Executive Headteacher of St Joseph's, Willesden and St Mary's, Kilburn in Brent;
- **Helen Tyler**; St Joseph's Catholic Primary School, Camden;
- **Claire McFlynn**; Executive Headteacher St Joseph's Catholic Primary School, Islington and St Aloysius Catholic Primary School, Camden;
- **John Lane**; Executive Headteacher of Sacred Heart Catholic Primary School, Islington and Christ the King Catholic Primary School, Islington;
- **Angela McNicholas**; Headteacher at Our Lady of Muswell Hill, Haringey;
- **Stephen Wheatley**; Executive Headteacher of Holy Rood Catholic Primary School and Divine Saviour Catholic Primary School in Watford, Herts.

- **Danny Coyle;** Newman Catholic College, Brent;
- **Ed Conway;** St Michael's Catholic Secondary School, Garston, Herts;
- **Clive Mathew;** John Henry Newman Catholic Secondary School, Herts;
- **Maureen Williams;** La Sainte Union Secondary School, Camden;
- **Martin Tissot;** Executive Headteacher of St George's Catholic Secondary School, St Thomas More Catholic Secondary School and Bishop Douglass Catholic Secondary School (Cardinal Hume Trust);
- **Marion Doyle;** Sacred Heart Catholic Secondary School, Hammersmith & Fulham;
- **Mike Kiely;** Cardinal Wiseman Secondary School, Ealing;

The remit of this group who meet monthly is the following:

1. What do we think the leadership and management of Catholic education should look like?
2. What support systems need to be implemented to secure the highest standards in Catholic education?
3. What level of support do we need to bring in?

The following are questions submitted at various Deanery meetings across the Diocese in December 2016 and January 2017.

3. Can you please explain the following:

- **Unseen / unknown Articles of Association?**
- The Articles of Association for existing Academy models are available. They can be emailed to all those schools who request them. DoWAT AoA is 38 pages long. The Project Board in conjunction with local Family of School Boards will shape the local AoA. This will be done in conjunction with the CES models and legal advice and guidance. This can be found at <http://www.dowat.co.uk/site/data/files/pdf/documents/CF56233E77B92C7BF2D65C511A44E9C4.pdf>
- **What is the role of current governing bodies – Unknown Scheme of Delegation?**
- This will be shaped by the Governors' Working Party who will make representation and recommendations to the Project Board as to the best way to secure all levels of governance within and Academy model. One key element is to match diocesan need with national expectation. There is genuine concern that we do not wish to alienate or lose many good governors and it will be case of matching need with a skill set and experience that allows each level of governance to work well and, if possible, better than what we have at the moment.
- **Membership of the Board of Directors?**
- As above
- **Executive Lead Officer/ CEO?**
- This will be shaped by the Headteachers' Working Party who will make representation and recommendations to the Project Board as to the best way to secure support and challenge within the Academy model. It is the expectation this individual will be an experienced Headteacher looking for a new role. The remit is to challenge and support and work with Heads to allow them to run their schools knowing the professional support and backup is available. The Lead Officer is the individual OfSTED will hold to account if there are problems with the Trust as a whole.

- **Financial arrangements and commitments for schools within the trust?**
- A very detailed costing document has been produced for the DfE and EFA regarding the set up and conversion of schools into Families. You will understand that determination of finances is very much dictated by how many schools initially join the Trust.

4. Why is there a lack of Headteacher representation on the Board of Directors of a Trust?

In order to protect and serve headteachers it is proposed that there will be no serving Heads on their local Trust board. The Trust board is the accountable body and Heads cannot be accountable to themselves. However, it would seem appropriate to have ex-officio representation by both a Primary and a Secondary Heads in attendance. This ensures transparency and dialogue. There will be a separate Headteacher Board in each Trust that makes recommendations to the Board of Directors. The Project Board, in conjunction with various working parties and the CES, will determine the exact nature of how Heads are represented and are held to account.

5. Is there sufficient information and evidence for governors as well as a level of governor understanding at this point necessary for full governing body votes to be taken and carried on the issue of whether or not to join the proposed pilot trust?

It is important all governors are fully aware of the implications and processes regarding conversion. It is the Governing Body's decision, not the Head's alone. There are materials for governors to access and there is a prepared conversion proforma produced. It is true to say confidence and understanding at governor level is mixed. It is down to the Governing Body to develop its understanding and if questions arise to ask the Project Board, Diocese and DfE of implications. Arguably, there is sufficient information produced but the Board needs to feel it is in the best interest of its own school as well as supporting the common good. Any governing body seeking clarity on any issue should to contact the Education Service directly.

6. Is the time frame proposed achievable and realistic?

Yes. But it is about getting it right and if more time is required then we proceed at the pace that is manageable and deliverable. No CAT will be fully converted at the start or possibly even in the future. This is about building and growing exponentially. Having 6 or so schools at the start is viable and manageable. However, this is very much determined on pupil numbers and we would need to examine carefully how the service provision could grow over time.

7. How does the proposed model meet local need?

Protecting and securing Catholic education for the future it at the heart of this strategy. How we meet local need is determined on how much we are prepared to work for one another and with one another. By examining closely the local need as well as the wider Catholic community need we can help shape a way forward.

8. Is there a need for a Diocesan Schools Company to form part of the plans for the academisation of Catholic schools?

It is proposed to look at how a Diocesan Schools Company can find the best provision for schools. Not to replicate existing high quality provision, but rather to broker the best deals for schools and colleges. It would be

shaped on local need and local provision. This is a ground up company and not an imposed model from above. There are many opportunities but the remit from the Heads working party was crystal clear – start small, prove your worth and grow in time.

9. What is the position of current Catholic Academies in the proposed Watford and Harrow Trust – DOWAT and ASCAT?

The Project Board will examine the legal advice as to when the present situation regarding DOWAT & ASCAT can change. It is about managing and mitigating risk. The Project Board will advise the various Trust Boards on the way forward and timescales and costs incurred to convert. It is hoped to have this questions answered in February.

10. Autonomy for Headteachers in the Trust model – what does this look like?

- Headteachers or Executive Headteachers will lead their schools as they have always done.
- Headteachers or Executive Headteachers will be accountable to their Local Academy Council (Board of Governors) as they are currently.
- Headteachers and Executive Headteachers will also be accountable to the CAT board in the same way that they are currently accountable to the LA and Diocese.
- Headteacher and Executive Headteacher appraisal will be carried out by the Local Academy Council in conjunction with the Lead Officer or an external assessor from a list approved by the CAT Board.
- If there are concerns about the performance of a Headteacher or Executive Headteacher this will be raised by the Local Academy Council (LGB as is currently the case) and may also be raised by the CAT Board (in the same way the LA or Diocese might at the moment).
- When a Headteacher or Executive Headteacher post becomes available it is for the CAT board in partnership with the Local Academy Council to decide what sort of headship post will best suit the school.
- The Lead Officer is the official who holds the accountability of the Trust board to OfSTED. They will work in a role similar to a SIP providing the support and challenge when required. If the school is doing well the focus is on support. If it is not then they will be working with the board to address any issues that may arise.

11. Is there an opportunity for other academy models to still be looked at / considered as possible solutions for the academisation of Watford and Harrow Schools?

The model has been chosen for the greater good of the whole diocese. What is up for shaping is the various ways the model could potentially work. Each FoS will be able to make representation to the Project Board to determine the local need and local opportunities.

12. Do you need to be an Academy to share resources with other schools in your Deanery?

No, you can share resources with schools within your Deanery and continue to do so. The strength of the model proposed is the opportunity to increase that capacity to share resources in a more coordinated and structured way.

13. Why have three Families of Schools been reconfigured?

Hackney and Westminster schools made a representation to the diocese to see if the original family of schools they had been ascribed to could be reviewed. We listened and changed them to accommodate the existing partnerships that work and provide opportunities for the future. Therefore, Family 7: **Camden & Islington**; Family 8: **Kensington & Chelsea, Hammersmith & Fulham & Westminster**; and Family 9 **Hackney & Tower Hamlets**.

14. How can an Academy trust offer more than what we receive already?

- In many local authorities the future of support for key services is a very mixed picture with the ESG (Educational Services Grant) being withdrawn in 2017 for LAs, many of you will have received a consultation from you authority on the delegation of services and it will be a discussion for schools locally which services they will be willing to fund, with funding concerns across the sectors on the horizon there is likely to be less agreement as schools try to balance their school funds and look for the most cost effective delivery.
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/579310/ESG_transitional_technical_note_2017-18_Final_GH.pdf
- Opportunity to tailor services more specifically for the sector especially in areas such as HR ensuring a clear understanding of the specifics of operating under the CES not LAs employment procedures. Considering sharing some key sector specific posts such as Chaplaincy role across schools. Trusts already converted as a group have shown significant savings in costs on contracts and services delivered as a group such as software implementation, shared consultancy services, procurement services. For example, for a policy template why re-create it 15-20 times in a similar format why not work together, all contribute to one and share one example of exemplar practice?
- Currently VA schools only receive a 90% grant for capital works and have to fund raise for the 10% balance. VAT contribution is paid as an element of the grant but is a formula calculation not actual full VAT refund, as an academy receive 100% Capital grant and full reclaim of VAT for all Capital expenditure.

15. What happens to that money? Will everyone get a share?

The Master Funding Agreement is signed by the Trust Board and each school signs a supplementary funding agreement but the funds are accountable to the Trust Board , the funds are calculated based on the local authority formula currently and this will move to the National Funding Formula so over time there should be less discrepancy across authority based on the consultation guidance but we are still in a period of consultation. The Trust Board has to fund and operate each school to ensure outcomes are delivered and the EFA will know how much funding has been allocated to deliver these outcomes in each school. Currently schools do not receive all of their funding. The LAs have historically top sliced the funding blocks to pay for central services of their choosing and then shared out the balance to schools through a local formula of their choosing often to the detriment of Catholic schools. The LAs also expected SLA buy back on other services from your budget. As a Trust Group you will deciding on what key central services you think are needed as a group, costing these and then looking at how much funding is then left to distribute on the formula. The difference is transparency and control rather than an outdated LA formula with historical statistical data.

16. Is this an unnecessary extra cost?

The actual cost of the conversion is paid as an additional grant to schools of £25,000. Each school currently pays either from the previous ESG L.A funding / top slicing or via an SLA for services by the local authority teams. The option as an academy is to review the provision and look at who is best placed to provide services and economies of scale. For example Education Welfare Officer are you best placed to continue to buy into an overstretched service at your authority or consider appointing your own EWO across your Trust working to support families from Early Years to Secondary, building strong links with families through their school journey.

The recent review by the Education Policy Institute on MATs indicates that geographical or regional area MATs show evidence of economies of scale and present significant opportunities for working together on regional tendering, coordination of services, standardised templates in reducing costs and saving time for the staff in schools. The report highlighted the benefits in cost sharing specifically to Primary schools of being part of a MAT. Evidence from our own schools in Trusts shows there have been savings achieved for schools within the Trust which has released funds back into the budget.

17. What are the concerns about finance and schools not controlling their own budget?

Each school signs a supplementary funding agreement and agrees to uphold the requirements of the Academies Financial Handbook, under the Scheme of Delegation the Local Board will have the responsibility to account for The funding for that school against outcomes. The financial structure for Academies is very rigid as it is required to meet both Company and Charity Commission requirements. Currently schools already work to a Local Authority Financial Handbook which identifies what funds can be used for and how schools have to report their income and expenditure to the authority each period.

18. Schools are not charged to be members, but they are expected to pay a service charge for services. Is this too high?

There is an expectation on the expected services that will be delivered across a CAT from the EFA, the Diocese have carefully considered the EFA guidance on the expansion and growth of MATs and the new Competency Framework for Governance which includes CATs.

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/576240/Multi-academy_trusts_good_practice_guidance_and_expectations_for_growth.pdf

In looking at how this could be costed most efficiency the calculations have been based on looking at contribution from Age Weighted Pupil Unit Funding to cost a model offering best value across the CATs and opportunity to share some service provision and resources. The utmost effort will be made to keep costs down. The more schools are involved the cheaper service costs will be.

Examples of key services would be:

| Cost per CAT assume structure at full capacity |
|--|
| Initial Conversion costs |
| Set up Costs |
| Legal CAT |
| Diocese Legal |
| Board Training Board Directors |
| Lead Officer Training |
| Company Secretary Training |
| Actuarial reports |
| Banking centralisation |
| Alliance with suppliers |
| Purchasing consultant OJEU |
| Head Office set up computer/ workstation |
| Website creation meet statutory compliance for CAT |
| Company documentation/ Branding |
| Financial review KPIs for each CAT Group |
| Standards set up of Data Reporting : Employ Data Analyst shared resource |
| CAT School Business Manager central post shared resource or based one of the CATs consolidation work |
| Administration Support from Project Team to set up each CAT |
| Governance quality assurance overview for CAT to review LGB quality assurance |
| Admin support from Project Board for setting up CAT |
| To manage conversion support for each school |
| Risk Management software for CAT |
| Health and Safety initial Report create central register |
| Standards Lead to support schools – Minimum two shared resources |
| Property Survey Capital Strategy |
| Legal conversion costs per academy (180-17) |
| LGB Training on responsibility/ Scheme of Delegation assume 12 per LGB |
| Headteacher Training on roles and responsibilities |
| SBM training new financial responsibilities |
| Clerks training |
| Succession planning programme |
| Training for schools on CAT reporting formats for committees |
| Financial Software for CAT |
| External Financial consultancy visit support Chair Finance, HT, Finance Team |
| Audit Train Support for CAT on AR/Budget/TPA consolidation |
| Internal Audit for CAT |

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| HR Adviser to support service across CATs- shared post |
| Budget Forecasting software |
| Post Conversion: |
| On going annual licence for Risk software post conversion |
| On going annual licence for Financial Software per school |
| Lead Officer Refresher |
| Legal Helpline |
| Legal costs Policy Review for CAT per annum |
| Estimated Audit costs based on DOWAT Fees |
| On going annual licence for Health and Safety |
| On going Budget Forecasting software licence |
| On going website maintenance |
| Governorhub to central record Governor database or similar product |
| |
| Standards Lead to support schools allocation 7.5 days per school estimated |
| HR Adviser to support service across CATs ongoing |
| Company Secretary 0.2 ongoing |
| Lead Officer recharges |
| Banking centralisation |
| Annual Return Submission Filing |
| Annual Actuarial Statement for Audited Accounts |
| Administration costs per CAT shared resource or recharge from one school |
| CAT School Business Manager central post shared resource or based one of the CATs consolidation work |
| Internal Audit function shared resource across CATs fund over time from reduced Audit costs |

19. Queries about funding - how will funding be allocated to schools?

Funding will be allocated to the Trust through the Master Funding agreement each school will have a supplementary funding agreement and each Local Board will have the responsibility under the Scheme of Delegation and the Academies Financial Handbook to manage the budget for the school to the same high level of accountability as currently exists across our school. Each schools budget will be calculated by the EFA based on the Local Authority Formula, whilst we await the second consultation on the National Funding Formula and how this will be implemented and whether local variables will be allowed for local issues. The accounts can either be set up so each schools allocation is paid in directly to a school level account or that a payment is made to the Trust and then forwarded to the schools. There could be a possibility that all the schools may wish to come together under one payroll provider so you may consider a central account for the payment of wages and tax so you can look to get higher rates for the funds awaiting payment to the HMRC for the following month which be one of many options to offset part of the central cost functions by the use of economies of scale.

20. LCVAP funding - how will this look in a CAT?

There is no LCVAP. School Conditions Funding on a three year cycle for MATs of five or more, allocated to Trust to spend on building stock and ensure deliver on the Capital priorities identified by EFA. Funds allocated for the year, end of year return to identify expenditure. Example of funding allocations for DOWAT in 15/16: All funding at 100% and VAT reclaimed.

| School Name | MAT Allocation 15/16 |
|---|----------------------|
| Convent of Jesus and Mary Language College | £190,820.88 |
| Nicholas Breakspear Catholic School | £135,212.40 |
| Our Lady Roman Catholic Primary School | £40,944.60 |
| Saint Michael's Catholic High School | £214,435.00 |
| St Catherine of Siena Catholic Primary School | £46,086.00 |
| St John Roman Catholic Primary School | £40,754.16 |
| St Mark's Catholic School | £222,624.36 |
| St Mary Roman Catholic Primary School | £39,801.96 |
| St Thomas More Roman Catholic Primary School | £42,277.68 |
| The Douay Martyrs Catholic Secondary School | £253,475.64 |
| The John Henry Newman Catholic School | £299,371.68 |
| Trust rounding adjustment | £65.64 |
| | £1,525,870.00 |

21. Parental School Building Fund contributions - how will this look in a CAT?

The CAT will encourage parents to continue to support development of school and still able to contribute to and use the Building Fund Scheme. It is still an important route to support the improvement of the school. All schools in current Trusts have the same access as VA schools to the scheme.

22. What will happen to universal lunch provision that Islington provides for all our schools?

Universal Free School Meals Grant is a government not L.A grant if there is a lunch provider service by the authority is will be being funded from within the grant or the contributions your school is making back currently.

23. What will happen to staff employed through services purchased centrally by Islington LA? - e.g. Caterlink

If you currently buy a contract which you are happy with you can novate this into the Trust, if there are several schools using the service you may wish to consider if it provides the best value or whether it may be better to go back out to the market.

24. How will the introduction of 30 hours entitlement for some 3 and 4 year olds effect those schools who already have full time nurseries? How will this look in a CAT?

Each CAT will need to look at the Early Years Funding Consultation in each authority as each authority has targets for delivery from its Early Years providers currently. As we move to a universal base rate across providers by 2019/20 schools geographical closeness may find it of benefit to share some resource provision of services across the CAT.

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/574040/Early_years_funding_government_consultation_response.pdf