

CELEBRATING THE BEST IN ACADEMIES AND FREE SCHOOLS

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**LORD AGNEW ON FINANCIAL MANAGEMENT
MARY MYATT: THE CURRICULUM
& ALL THINGS GOVERNANCE**

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WHY VR VIDEO IS DESTINED FOR THE CLASSROOM

Immersive fieldtrips without leaving the classroom. Virtual school tours for prospective new starters without the need to wait for an open day. Virtual Reality (VR), and with-it VR video, has an enormous amount to offer schools, and the Vuze 360 3D VR camera is the perfect tool for those looking to enter into the world of VR.

VR is fast becoming the must-have tech for all storytelling faculties, from art to drama to science. There are a whole host of VR videos now available including tours of cities, natural wonders, museums and exhibitions from all over the world. There are also videos that offer experiences such as scuba diving, flying in the cockpit of a plane and building a car. Allowing students to see this footage through a VR headset provides an immersive, inspiring and unforgettable learning experience.

Every teacher will know how easily distracted students can be and maintaining their interest can often be difficult. Taking pupils out of the classroom and immersing them in a new experience can help to keep them engaged but this can often come at a heavy financial cost. VR is the perfect solution for this. Using VR headsets, students can delve into a whole new experience or discover new places all whilst in the safety of the classroom.

To unlock the true potential of VR in schools, however, the schools themselves must become the creators, and to do this they require a VR camera. The cameras can be used to record field trips, experiments, workshops or lessons, all of which can be

viewed by the students whenever they choose. The ability to watch an immersive VR video of a past lesson during revision time is an incredibly useful and powerful tool during the build-up to exams.

Teachers and staff can also watch back lessons or workshops to experience the class from the pupil's perspective. This footage can be used to improve teaching methods, review teaching performances and also provide new parents with an idea of what the school offers.

VR video can also be a powerful marketing tool, particularly when providing a virtual tour of the school and facilities. Prospective parents and students will be able to take a tour of the school online and see all the facilities available before deciding whether to enrol their child. The footage can also help to put new students at ease, allowing them to experience their first steps into their new school from home, making them feel more confident when the day arrives. Starting at secondary school can be a daunting experience so offering the unique ability of being able to see what the average day will be like would be very comforting and reassuring.

The true benefit for students, though will be when they get behind the lens and become the creators of their own footage. Encouraging pupils to create their own VR videos and explore their creativity would allow for expression, engagement and skills development. Students would be able to record their experiences, from birthday

parties to football matches, or develop their own films.

The Vuze camera from HumanEyes allows schools to perform a whole host of creative tasks. From filming, to editing and viewing, all that's needed is a Vuze camera, your computer and headset. With 4K resolution and eight camera lenses combining to create a 3D, VR experience for around £1,000 and in a small form factor, Vuze is the perfect answer for those in search of professional results on a limited budget. Editing VR videos is traditionally a difficult and time-consuming process, however HumanEyes has made this incredibly straightforward thanks to the Vuze VR Studio, a powerful but easy to use editing suite which is included with all Vuze cameras.

The cutting-edge technology in Vuze cameras also enables events to be broadcast live to Facebook, YouTube and Periscope, allowing schools from around the world to share live performances and events.

VR is set to be the next technology to revolutionise teaching and learning in the classroom thanks to its significant benefits for teachers, students and parents alike. HumanEyes, and the company's Vuze cameras, offer the perfect solution for schools to both record, experience and inspire within the world of VR.

W: vuze.camera



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Editor

Alex Sharratt (JCEL)
 Published by
 John Catt Educational Ltd,
 12 Deben Mill Business Centre,
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 Fax: (01394) 386893



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Subscriptions: Sara Rogers
srogers@johncatt.com

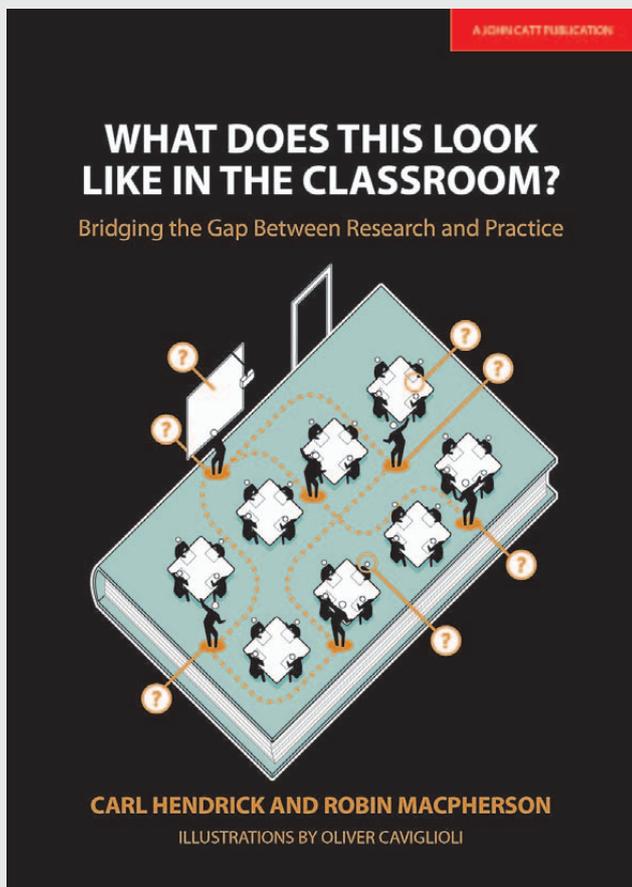
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WHAT DOES THIS LOOK LIKE IN THE CLASSROOM?

Bridging The Gap Between Research And Practice

By Carl Hendrick And Robin Macpherson

There are no silver bullets for what works in classroom. There is however, sound research that gives us all at least the starting point to consider and develop our own practice. Carl and Robin provide you with access to a lot of this and then point you in the direction of even more.

“Marvellous!” – Daniel T. Willingham

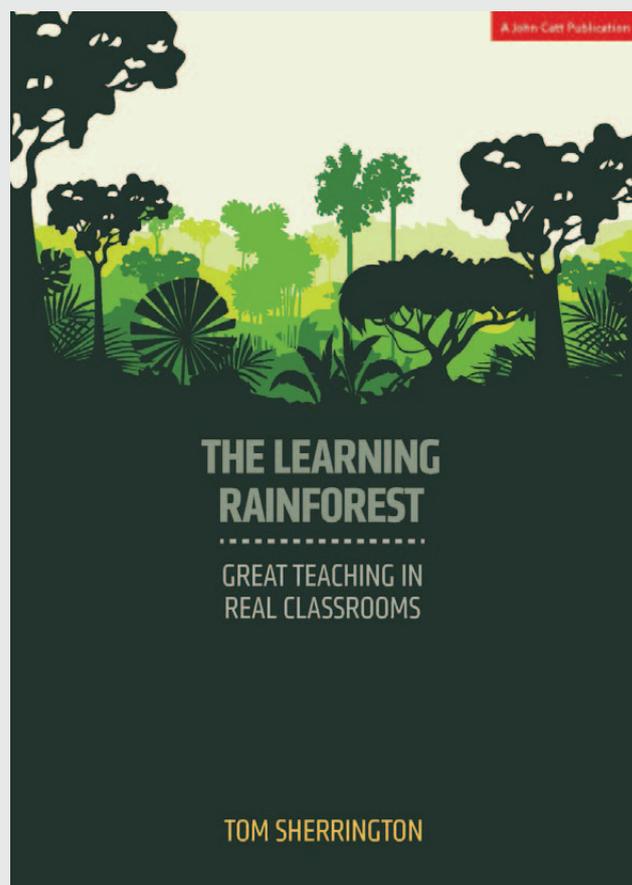
THE LEARNING RAINFOREST

GREAT TEACHING IN REAL CLASSROOMS

By Tom Sherrington

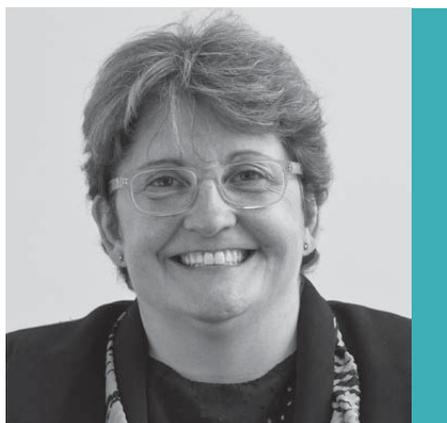
A big leap forward in transcending the debates between traditionalists and progressives. Hacking through the undergrowth of academic research and passing fads, Tom takes readers on a journey to the sunny uplands of classrooms in which powerful learning and rich experiences can flourish.

“Wise, balanced, practical, and grounded in research.” – Doug Lemov



E: enquiries@johncatt.com
T: +44 (0)1394 389850
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Independent thinking for education



EVERY CHILD INCLUDED

Sonia Blandford on how Achievement for All are attempting to meet the needs of the disadvantaged, vulnerable and underachieving

Earlier this month Damian Hinds, Secretary of State for Education encouraged some new thinking to increase social mobility across the UK. Many of the points raised relate to areas that have been considered by practitioners and educationalists committed to social mobility.

It is recognised by a range of experts including the Education Policy Institute and Social Mobility Commission that the UK education system is struggling to meet the needs of at least one in five children and young people: the disadvantaged, vulnerable and underachieving - 20% of children who are unprepared for their lives post 16, whether in education, training or employment

For over a year Achievement for All has been developing Every Child Included in Education, a collaborative manifesto that follows the publication of *Born to Fail? Social Mobility: A Working Class View*, which argues that if we don't radically re-think our nation's approach to social mobility millions of children will continue to be lost within our education system, impacting on their work and life chances.

We need to act fast and act now to galvanise society against what is ultimately the greatest social injustice of our time by bringing together all educational provision, private, independent and state in supporting and delivering change.

Senior Academy and MAT leaders have contributed to the development of this thinking, rooted in evidence-based practice over the last ten years. Every Child Included in Education is seeking all stakeholders including ministers,

commissioners, senior government officials, business, public and third sector leaders to increase collaboration, support and training for all providers and services across the country.

Ultimately, this manifesto seeks to enhance life chances and provide choices for every child regardless of their background, challenge or need.

Achievement for All is collaborating with leaders from business, education (state and independent across all phases and type, including Regional School Commissioners, Opportunity Area Boards, Teaching Schools Alliances and Research Schools), public and third sectors, parents and carers, and children and young people, to deliver against five co-developed Every Child Included in Education priorities:

1. Promote kindness and wellbeing in education, business and third sector settings, where every child and young person is included every day, addressing mental health, character and resilience through culture and mutuality, celebrating tolerance, patience, friendship, creativity and problem solving

2. Further investment across all phases of education, beginning with the early years that results in a socially and culturally relevant curriculum, increasing attainment in reading, writing and maths, enhancing life chances and culminating in a meaningful destination for every child

3. Greater focus on teachers as professional learners through recruitment, retention, and professional development that includes an enhanced understanding of the way disadvantaged and vulnerable children learn

4. Reduce children and young people being excluded in education:

- a) increase responsibility for children at risk of exclusion through cross-agency collaboration to reduce exclusions and minimise the number of children and young people at risk, and

- b) close the gap for SEND, too often the marginalised and forgotten group

5. Increased recognition of parents, carers and wider communities, valuing all parents and carers as crucial partners in the improvement of learning and life chances for every child.

Achievement for All acknowledge that Every Child Included in Education priorities are set within the context of the government's Social Mobility Action Plan. We have created this collaborative campaign to focus activity and embed change over the next two years.

Every Child Included Conference 17th October 2018

You are invited to join our national conference, embracing the journey of every child in education from 2 to 24 years. Keynote speakers include Anne Longfield (Children's Commissioner) and Opportunity Area leaders. National experts from every phase of education will provide evidence-based advice on policy and practice. We will also feature a significant number of workshops, exhibitors from partner organisations, settings, schools and colleges.

For further details
afaeducation.org/2018-conference/

“IT ALL STARTS WITH GOOD GOVERNANCE...”



Academies Minister Lord Agnew gives his take on what good financial management looks like...

When the first academies opened in 2002, the focus was on helping struggling schools make a fresh start and providing the best foundations for raising educational achievement. Since then the sector has expanded to encompass nearly half of all state educated children. Many successful schools, both primary and secondary, have become academies. Multi-academy trusts have increased opportunities to share expertise and to achieve economies of scale. Free schools have offered new provision where it is needed.

However, the fundamental driver has not changed – the desire to ensure our young people receive an excellent education. Pivotal to this is the need for good financial management and a clear link to how public money is supporting pupils.

What does good financial management look like? At its core is the need for effective internal oversight and control throughout the organisation.

It starts with good governance

To support this in an academy trust the board should focus on three core functions – strategic direction,

holding executive leaders to account for educational performance and making sure the trust achieves effective value for money. The chair has a key role in ensuring the board functions effectively in these areas. This means:

- committing to the legal framework – understanding and upholding the board’s duties as company directors (such as taking reasonable care, exercising independent judgement and avoiding conflicts of interest) and following the requirements of the trust’s funding agreement
- establishing strong board engagement and challenge – meeting sufficiently often as a board (at least three times a year, but I would advocate six times), having unambiguous dialogue between the board and managers, and operating on consensus
- developing the board’s capacity and capability to ensure it has the skills and experience to use the financial and other information it receives
- ensuring the trust has robust internal controls including suitable financial and risk management procedures

Have a clear scheme of delegation

Whilst the board retains responsibility for the trust’s overall direction, it will need a written scheme of delegation so that everyone’s role in financial management is clear. This should cover the remit, decision-making powers and spending limits (where appropriate) of any committees, and of individual staff including the chief executive or principal, the business manager and any budget holders.

You should also consider how to maintain separation of duties so that the scheme of delegation avoids spending being wholly in the hands of one person. The board will need to set up a monitoring system to make sure the scheme is followed.

Take a longer-term holistic approach to planning

Financial management should involve both short term budgeting and longer term financial planning. To be most effective, you should consider how to integrate your financial plans into your broader business planning processes. The success of any school financial plan will

rely on making the right assumptions, including the realism of pupil number projections and hence the staffing mix and other resources needed to deliver the curriculum. Considering the budget when planning the curriculum can ensure your money is correctly focussed on teaching and your aspirations for educational attainment remain achievable with the resources available.

This can be helped by using appropriate data to understand educational performance and financial stability, allowing the board to better engage with and challenge the management team, and so strengthen decision-making. There is guidance to help you do this.

Long-term financial sustainability requires a reserves policy that balances spending and saving. As well as ensuring money in the bank to cover day-to-day costs and a contingency for unexpected spending, you will want to think about how longer term cyclical costs such as capital asset replacement are funded.

Have the right information to control the budget

Keeping on top of financial plans depends upon the quality, frequency and use of your budget monitoring information. Preparing monthly reports to highlight and explain variances from the budget means you have time to take action to bring spending back on track or to change your priorities. The trust's managers and the chair of the board should see financial reports every month and other trustees at least every other month. Your business manager will want to ensure the format of the reports is suitable for the different users, including summaries, narrative, performance indicators and dashboards to bring out key points.

Ensure you spending decisions stand up to review

Following a competitive procedure when buying goods and services makes sense. Obtaining quotes, or inviting tenders for larger purchases, and benchmarking your costs, should increase the chances of getting a good deal and show that your decision-making is impartial. One way to

make this process simpler is to consider national deals where the hard work has already been done to find suppliers that offer suitability and value for money. Whichever approach you use, you should make sure that your rationale for selecting a particular supplier, especially for major spending commitments, is adequately documented and justifiable. From 1 April 2019, if you are buying from related parties you will need to report the transactions to ESFA in advance and will need to get ESFA's approval if they are over £20,000.

View scrutiny and challenge positively

Both self-review and external scrutiny provides assurance that an academy trust's financial controls are operating effectively. In practice, self-review means trusts having a committee of the board to oversee the suitability of, and compliance with, internal controls including delegated spending levels and to manage the related risks. This committee should identify someone, either in-house or bought in such as an internal auditor, to perform appropriate checks and to report regularly on their findings. More broadly, the board should assess its own governance each year in terms of its skills, effectiveness, leadership and impact, ensuring a mixture of abilities including educational, financial and wider commercial skills. The requirement for external audit of your annual accounts provides a further opportunity to identify areas of financial management and governance that can be improved. Responding positively to auditors' advice can help enormously to manage your money better.

Be accountable and transparent

Accountability is at the heart of good financial management. It involves taking ownership of financial decisions and actions and being answerable to those affected by them. In academy trusts, accountability is formalized in the role of the accounting officer (the senior executive leader) who is responsible to Parliament for the financial resources under the trust's control and for ensuring that suitable financial systems are established. For accountability to work

properly, you need to be transparent about your finances and able to demonstrate to stakeholders how you have used your resources and what you have achieved. Your annual report and accounts are the main way of doing this. So it is important to apply the disclosure requirements in the Academies Accounts Direction when preparing them, to provide sufficient detail in your trustees' and accounting officer's reports to reflect the trust's activities, and to make them public quickly – putting them on the trust's website by the end of January and filing them promptly with Companies House.

Finally, think “regularity, propriety and value for money”

These principles should guide you in financial management at all times. Regularity means spending money on the things for which it was given. Propriety is about applying acceptable standards of conduct and behaviour to your spending (for example avoiding conflicts of interest). Value for money involves getting the best possible educational outcomes through the economic, efficient and effective use of your resources.

Your accounting officer has a responsibility for ensuring regularity, propriety and value for money but, in reality, these concepts should be followed by everyone in the trust. If they are achieved, it gives the best chance of making every penny count towards the futures of our young people.

So good financial management is an essential feature of any well-run organisation. The outcome should be to ensure that an academy trust has its financial resources allocated to support education in the most effective way possible.

We describe the key requirements for academy trusts in the Academies Financial Handbook. We also publish a range of other material to help academies manage resources well, including benchmarking tools, guidance on workforce and curriculum planning and a top 10 of planning checks for governors. Whether you are an academy member, trustee, manager or auditor, I hope you will find them useful.

SUBJECT KNOWLEDGE



Knowing stuff makes a difference, says Mary Myatt.

'Knowledge begets knowledge.'
E.D Hirsch.

Our pupils need to know stuff and the minimum standards for that stuff are expressed in the National Curriculum documents for each subject. There is no getting away from this for maintained schools. Academies and free schools are able to determine their own curriculum, but the obligation is still to ensure that it is broad and balanced.

However, the main question is, do our pupils know, really know, on their own terms, the key aspects of a topic in history, geography or whatever subject? Are they capable of producing something worthwhile as a result of acquiring that knowledge? In other words, are they creating something with what they have been taught or are they consumers of worksheets?

There are two strands which need strengthening in relation to pupils' subject knowledge. The first is that in the past, there has been too much emphasis on

skills development. Skills are important, but they do not stand alone as aspects of learning, separate from knowledge. So, for example, pupils have been given a piece of prose to read and then asked what they 'infer' from the text without discussion or support to understand that there is often much implied behind a text which is not explicitly written or spoken.

Sophisticated

This is sophisticated work. It is like peering through the shadows to glimpse at more information. It is there, but it is subtle. And just telling pupils that it is there is not the same as supporting them to find what is there. Sometimes, mistakenly, the text is regarded as less important than the 'skill' of inference. But it is the text which is the locus of inference: it is the text itself which provides the clues, it is knowing what the text is communicating beyond the actual

DGE AND PUPILS

statements, what it might be hinting at, what might be implied, or what might be inferred. It is the text which is of primary importance and the capacity to infer can only come from deep engagement with that text.

Capacity to understand

The same mistake happens with comprehension. The capacity to understand the material in a text does not stand separately from the text. We cannot assume that focusing just on the skill of comprehension is going to get our pupils to understand or comprehend any other text. The two examples here of inference and comprehension can only emerge through the engagement with lots of material. We cannot say that, because a child can make inferences from one piece of prose, they are equally able to do it from another. Similarly with comprehension. And this is because the skills are closely bound to the subject matter of the text. So, if we are concerned that our pupils' skills in inference and comprehension need to be developed, we should not be focusing on these skills without exposing them to lots of different texts.

Daniel Willingham and Gail Lovette researched the impact of comprehension instruction. What they found was that explicit instruction to pupils - to get them to focus on finding the meaning and to ask questions about a text - improved their comprehension and inference capacity, but that continuing to teach comprehension did not have an impact. They argue that teaching comprehension and inference is useful, but only up to a point. And this is because they are not transferable skills. It doesn't follow that if I understand and can infer from a novel, that I am able to do the same from a news report. So, we need to conclude from this that while instruction and support to comprehend and infer are important, they are always bound to the material in hand.

This is why pupils need to read and be read to a lot, so that they have practice in these important skills across a wide range of material. If, as Willingham argues, 'comprehension is highly text-specific and dependent on background knowledge' then we need to make sure that our pupils have plenty of knowledge. This is echoed in Hirsch's book 'Cultural Literacy' written in 1987. The idea that what separates good readers from poor readers, once we get beyond the mechanics of instruction and phonics, is their background knowledge.

Skills do not stand alone

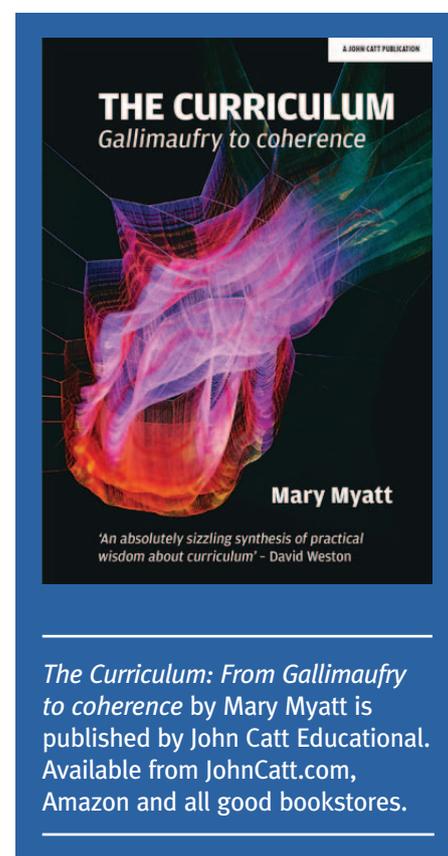
And where are the skills in all this? Well, the skills do not stand alone; they are context-dependent and draw on the content. It is not possible to evaluate or analyse material without knowing the facts. The facts are the building blocks not just of cumulative knowledge over time, but supplying the means with which to interrogate and discuss. Separating the skills from the content has meant a focus on, for example, inference, without providing plenty of examples from which the capacity to infer emerges.

Knowing things helps us to know more things. Knowing things helps us to connect with previous knowledge and to make connections. Knowing things makes us feel clever. When we take short-cuts with knowledge in order to move on to the acquisition of skills, it is like expecting a cook to make a meal with only one ingredient. It takes a range of materials or ingredients to produce something worthwhile.

Linked to this is the knowledge and use of subject-specific terminology which supports pupils to enter the domain of the academic discipline. Each subject has its own vocabulary, which is used specifically within that subject. In geography, for example, erosion has a particular meaning and this meaning

needs to be taught explicitly, practised and used on a regular basis. In history, we might identify civilisation, in religious education, worship, and so on. It is an entitlement for pupils to know what these words mean, how they fit into what they are studying and for them to use them with confidence. All pupils like feeling accomplished and it's paying them a compliment to induct them into the knowledge of a particular subject.

And finally, we know that there is a significant word gap between those pupils from advantaged backgrounds and some, not all, from disadvantaged backgrounds by the time they start school. There is nothing we can do about this, but we can do something about it the minute they come into our classrooms. Knowing stuff makes a difference.



The Curriculum: From Gallimaufry to coherence by Mary Myatt is published by John Catt Educational. Available from JohnCatt.com, Amazon and all good bookstores.

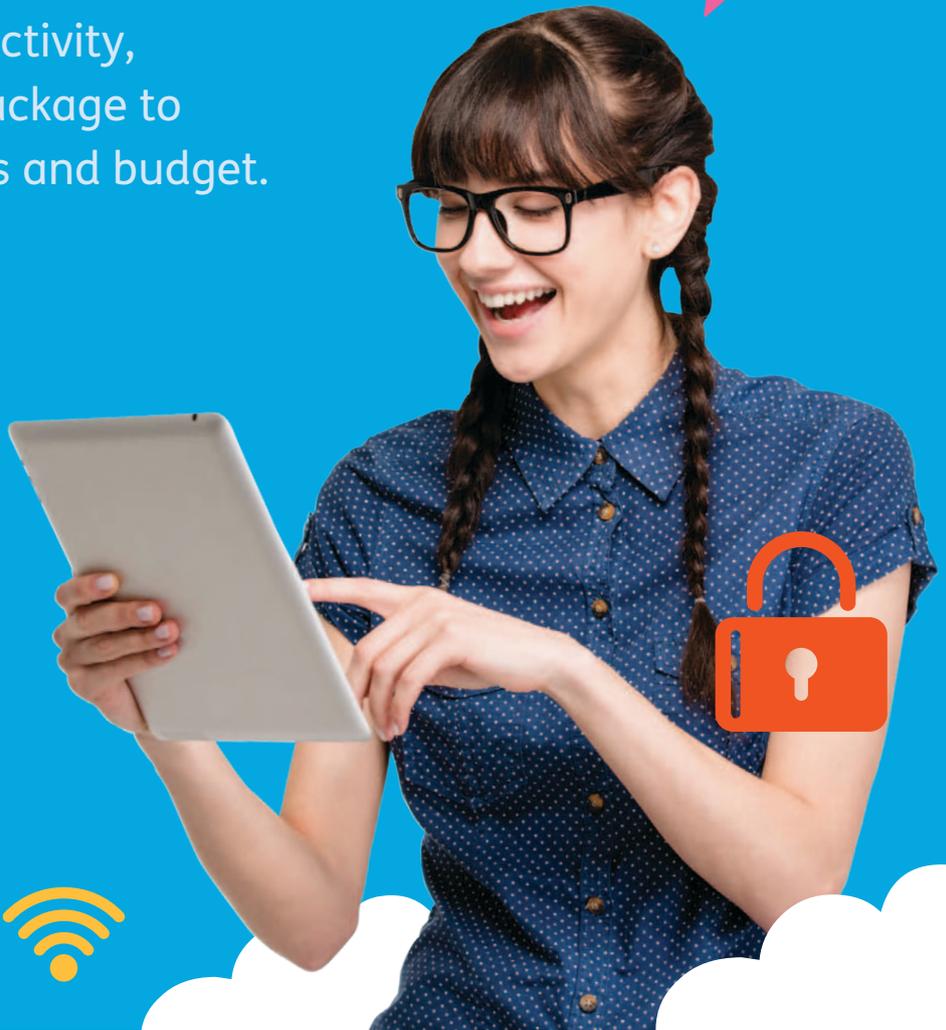


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IT'S THE CURRICULUM, STUPID...



Roy Blatchford reflects on 'the year of the curriculum' which lies ahead

Bill Clinton's successful 1992 presidential campaign slogan memorably read 'It's the economy, stupid'. His lead strategist James Carville hung a sign with these words in the Little Rock campaign headquarters: what was intended for an internal audience rapidly became the election signature tune.

For the 2018 - 19 academic year, Her Majesty's Chief Inspector has hung up the sign: 'It's the curriculum, stupid'.

HMI began visiting schools last term to seek views on how the curriculum should best be inspected when the new Ofsted framework comes into force in September 2019. The curriculum focus is already being played out in HMI monitoring visits to schools. Take this example from a recent letter to an improving secondary school: 'The school should ensure that the extent and depth of knowledge that pupils gain in each subject by the end of each topic is consistently clear'. This is evidently the way the inspection wind is blowing.

The fickle curriculum wind has blown in various directions over the past decades. In 1976 Prime Minister James Callaghan, in a speech at Ruskin College, Oxford, ventured to suggest that for too long schools had operated within a 'secret

garden'. He put forward, tentatively given the fierce politics of the time, the notion that there might be a child's entitlement to some kind of national curriculum.

Carefully harnessing the words of R.H. Tawney - 'What a wise parent would wish for their children, so the state must wish for all its children' - Callaghan moved on to say:

The goals of our education, from nursery school through to adult education, are clear enough. They are to equip children to the best of their ability for a lively, constructive place in society, and also to fit them to do a job of work. Not one or the other but both.

Thus began more than ten years of intensive and constructive debate.

Secretary of State for Education, Sir Keith Joseph, encouraged Her Majesty's Inspectorate to nudge the educational establishment towards the acceptance of a nationally prescribed curriculum. The HMI 'raspberry ripple' booklets (named after the colours of their covers) on curriculum subject areas were a significant milestone. The 1988 Education Reform Act finally brought a national curriculum in England into the schools' system - and successive governments have tinkered with it ever since.

Does the curriculum matter?

Not according to many respected research studies and educational commentators. In McKinsey's influential study 'How the world's best performing school systems come out on top' (2007), the curriculum barely gets a mention. The thrust of the report is that the quality of teachers and investment in their training are key determinants of great education, alongside an unswerving commitment by those teachers that no child should be left behind.

Expectations are all. The curriculum - what we teach - is nowhere.

Ofsted itself has waxed and waned in its own enthusiasm for the curriculum. Its report 'Twenty outstanding primary schools' (2009) placed little emphasis on curriculum content as central to these schools' successes.

In the 2012 inspection framework, there was little prescription; rather a focus on educational outcomes, however schools chose to achieve them. Inspectors worked with a relatively loose yet comprehensive description:

A broad and balanced curriculum which meets the needs of all pupils, enables all pupils to achieve their full educational potential and make progress

in their learning, and promotes their good behaviour and safety and their spiritual, moral, social and cultural development.

In the current 2018 framework, the word 'curriculum' does not appear as a key word in any of the section or chapter headings. Rather it features as one modestly worded aspect among many to be inspected under leadership and management:

The broad and balanced curriculum inspires pupils to learn. The range of subjects and courses helps pupils acquire knowledge, understanding and skills in all aspects of their education.

For teachers at the sharp end of leading curriculum development in schools, Ofsted was in my view at its descriptive, enabling best in the 2009 framework, defining an outstanding curriculum as follows:

The school's curriculum provides memorable experiences and rich opportunities for high-quality learning and wider personal development and well-being. The school may be at the forefront of successful, innovative curriculum design in some areas. A curriculum with overall breadth and balance provides pupils with their full entitlement and is customised to meet the changing needs of individuals and groups. There are highly tailored programmes for a wide range of pupils with different needs.

Authors of the next framework will do well to better this narrative, reminding us at it does that a school's curriculum is the sum of many parts, including the national curriculum.

What good schools do

I once heard a primary headteacher quip that secondary schools don't have a curriculum, just a set of examination syllabuses. There may be more than a grain of truth in that. And it can be argued that the curriculum does not matter. In the way that culture trumps systems, it is the quality of the teacher which trumps all. That said, from my observation of over 14,000 lessons around the world during the past fifteen years, I believe content does matter very much.

Great lessons are rooted in the richness of the task devised by the teacher. In turn, those tasks are rooted in a well planned, sequenced and imaginative curriculum which inspires curiosity, scholarship and divergent thinking amongst pupils. The Teachers' Standards (2012) roundly encapsulate this picture of fine classrooms.

It is certainly the case that good schools have thought through carefully their overall aims and values, and how what they teach in classrooms helps realise these goals. This might mean adopting or adapting the International Baccalaureate learner outcomes: knowledgeable, thinkers, communicators, principled, open-minded, caring, risk-takers.

Or it might mean shaping a curriculum vision around Howard Gardner's five minds for the future: the disciplined mind, the synthesising mind, the creating mind, the respectful mind, the ethical mind.

Whichever route is taken, schools in any society are immutably of the past,

present and future. What they choose to teach their children is a similar blend of history, contemporary knowledge, and a skills set for today and tomorrow.

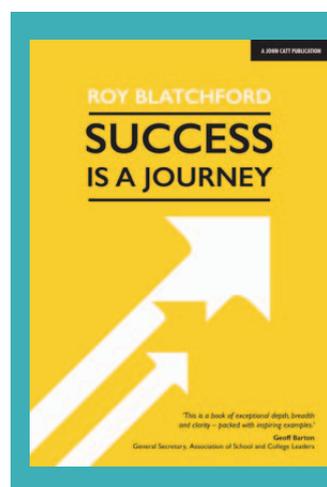
If we believe that schooling is merely about the training of the intellect then schools will be narrowly focused. If we have a broader vision of what it means to be human - artistic faculties, sporting prowess, moral sensibilities, spiritual quest - then schools will strive to educate the whole child.

The fun and fundamentals

In steering Ofsted ahead it will be fascinating to watch the extent to which the Chief Inspector steps into the 'secret garden'. How prescriptive of curriculum design and related outcomes for pupils will the September 2019 framework be? Will the Arts get a refresh? Will artificial intelligence feature? Will depth triumph over breadth? Will Ofsted avoid an either/or approach?

My profound wish is that whatever direction is signalled, the national inspectorate generously encourages leaders and teachers to hold onto the fun and fundamentals of learning which lie at the heart of great classrooms.

Schools making the most of this year of the curriculum will, in a spirit of ongoing self-review, look afresh at what they teach and why they teach it. If Ofsted's renewed focus on the curriculum has this benign effect then pupils and teachers will be the beneficiaries. And along the way schools should take every opportunity with a passing inspector to shape the 2019 framework's final text.



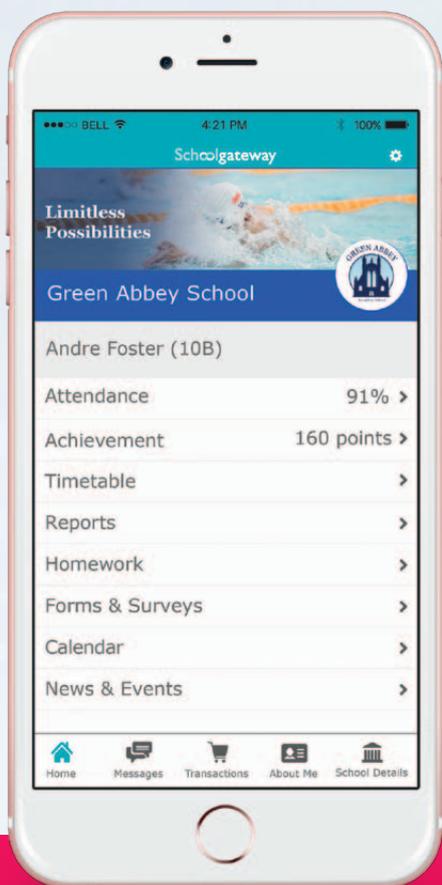
Roy Blatchford is founder of www.blinks.education, working with schools, colleges and universities in the UK and internationally. He has spent the past two years implementing education system reform in the Middle East.

Roy was Founding Director (2006 - 2016) of the National Education Trust, an independent foundation which leads excellent practice and innovation in education.

For 30 years Roy has been an international trainer and conference speaker on English and literacy, school improvement, leadership and curriculum development. He has been an adviser to various UK governments and is a member of the Education Policy Institute's advisory board.

Roy was appointed CBE for services to education in the 2016 New Year Honours.

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“THE DIFFERENCE BETWEEN A WORKFORCE THAT IS HAPPY AND ONE THAT IS NOT OFTEN COMES DOWN TO THE QUALITY OF WORKING RELATIONSHIPS...”

With parents increasingly under financial strain forcing them to work longer hours, teachers are not only expected to play social worker and counsellor but mum or dad too, says Natasha Devon

Over the past decade, I have lost count of the sheer number of roundtables, conferences and policy labs I have attended on the topic of young people’s mental health. Whether we’re discussing the impact of technology and social media, increased instances of teenagers being hospitalised with self-harm or academic anxiety caused by more rigorous testing the conclusion is always the same. This needs to be acknowledged and dealt with by teachers.

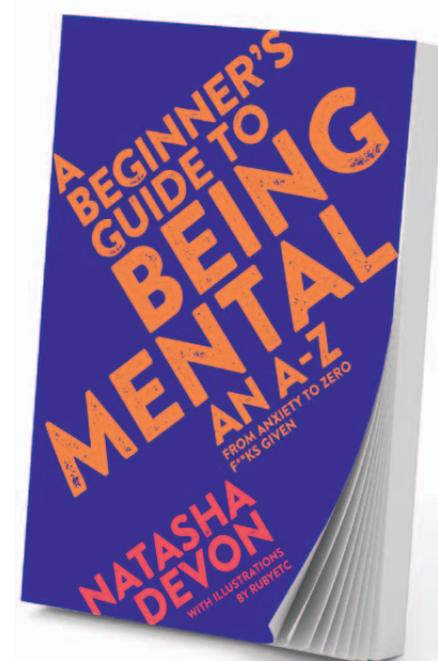
Since 2010, brutal funding cuts have seen communities lose social services, sports clubs and libraries. Schools have therefore become the last bastion – a building that can be relied upon to remain open. I have heard stories of teachers having to intervene in family situations where there is domestic violence, wash pupils’ clothes, even in one instance helping a family who had been made homeless to find accommodation, because there was simply no one else to do it.

Earlier this year, Damian Hinds

revealed plans to make mental health education compulsory in all primary and secondary schools across England by 2022, with each expected to have a nominated ‘mental health lead’. Yet with Children & Adolescent Mental Health Services cut by an estimated third since 2010, it is unclear what teachers are expected to do in the likely scenario that the mental health needs of their pupils go over and above what they are able to safely provide.

With parents increasingly under financial strain forcing them to work longer hours, teachers are not only expected to play social worker and counsellor, but mum or dad too. Just this week headlines reported a dramatic rise in the number of five year olds arriving at school without basic language and reading skills, unable to dress themselves and, perhaps most horrifyingly, not toilet trained.

On paper, the call for teachers to step into the breach makes sense. Government



cannot be expected to legislate for what goes on behind the closed doors of every



single home in the UK, but they do have control over what happens in schools. The problem is, of course, that austerity has impacted education to a huge extent too. In addition to Gove's attempts to 'improve' academic standards meaning teachers having to cope with seemingly endless surface-level reforms and do mountains more paperwork for results-related pay, the expectation that they will also do more for pupils pastorally has happened alongside squeezed budgets and

an industry recruitment crisis.

Is it any wonder, then, that the net result has been an unprecedented rise in mental ill health amongst teachers?

A BBC commissioned study for their *Inside Out* programme last year found that 70% of teachers have taken time off work in the past year for a physical or mental health problem they attribute directly to the stress of their job. Meanwhile, Leeds Beckett University published findings in January of this year showing half of

teachers have a diagnosed mental health issue and the NEU reported higher levels of teachers experiencing suicidal feelings.

Every single scholarly or press article I can find on the topic of teacher mental health places the blame squarely on workload. This is empirically provable – lack of time for recreation and relaxation can lead to over-production of a hormone called cortisol – an imbalance of which is one cause of depression. Increased stress also causes higher levels of adrenaline in

the body, which not only leads to feelings of anxiety and panic, but can also affect the immune system, making the body more vulnerable to physical illnesses. This is widely researched and well known. Yet, apparently, nothing is being done to address the unrealistic expectations being placed upon the teaching profession.

Some schools have introduced what might broadly be described as sticking plaster measures, with varying degrees of success. Teachers have been offered weekly yoga classes, mindfulness activities and team building excursions in an effort to boost morale. Whilst these aren't without merit (Mental Health First Aid England recommend taking one hour every day for these types of activities to maintain optimum mental wellbeing) they seem a little inadequate given the enormity of the problem at hand.

In my experience, the difference between a school workforce that is happy and well and one that is not often comes down to the quality of working relationships. School leaders are under huge amounts of pressure not only from policy-makers, but also often from parents. In the worst instances, they allow this pressure to trickle down to their staff, creating a fraught working environment. Schools are able to withstand higher levels of demand if the staff feel heard, understood and supported.

Mental ill health is also exacerbated if the person experiencing it becomes isolated. I've written often in my weekly TES column about how mainstream media wilfully conspires to represent teachers as untrustworthy or megalomaniacal and how that has in turn impacted social attitudes towards the profession. Teachers at all levels need more than ever to be supportive of one another both publicly and privately to counterbalance this.

Ultimately, however, this is a problem that can only be solved at the source. For all kinds of reasons, our education system is, I would argue, no longer fit for purpose. Adding endlessly to the teacher job specification can only mask the rotten core of the curriculum for so long when it is fundamental restructure and revolution that is needed.

And therein lies the catch 22... I've

been working in schools and colleges all over the UK for a decade now and I've only ever met two teachers who I didn't think were particularly good people. As a profession, teaching is populated disproportionately with individuals who are motivated by wanting to make a difference and who care deeply about the children in their charge. That's what allows them to be taken advantage of. To say 'no' is to potentially put the wellbeing of a young person at risk, in the absence of any other support.

That is why the government will, I fear, continue to apply pressure to the profession as, one by one, teacher snap under the strain. I'm often asked what can be done. I'm open to suggestions, but in the absence of a better one I am determined to use my platform to give this issue a persistent voice.

Natasha's top tips for safeguarding pupil and teacher mental health

Get MHFA trained

Mental health first aid training teaches delegates to spot early symptoms of mental ill health in colleagues and pupils, what to say (and crucially, what not to) and what is appropriate to recommend in terms of further support and self-care. Just like 'regular' first aiders, mental health first aiders are not a substitute for medical professionals. However, they are trained in appropriate protocol that can save lives. Find out more at www.mhfaengland.org.uk.

I'm currently campaigning for mental health first aiders in every work place to be enshrined in The Health & Safety At Work Act (as physical first aiders currently are). I'll be presenting my petition to Downing Street in October. Find more and sign the petition at www.wheresyourheadat.org

Reclaim sports and creativity

Subjects we know have a therapeutic value like sports, art, music and drama have been defunded, devalued and, therefore, squeezed out of the curriculum.

Some schools I visit have taken small but powerful steps to reclaim these activities, using a 'little and often'

approach. For example, Joe Wicks has produced a series of short YouTube videos for classes to do quick, energising workouts together without having to dedicate an entire lesson.

Get parents on board

In some of the schools I visit, parents of a whole year groups have imposed a 'cut off' time for mobile phone/internet use of, say, 8pm. This stops any pupil feeling singled-out or having the dreaded 'FOMO' (fear of missing out). It also encourages a unified approach between schools and parents.

Don't undervalue your role

So often, I hear school staff say 'we're talking about mental health all the time but there are no services/solutions'. This is, of course, a valid fear. Talking can't replace therapeutic services. But neither is it entirely futile. Just by taking the time to talk to a colleague or pupil non-judgementally you have improved their brain chemistry (by controlling their dopamine secretion) and given them the gift of clearer thinking.

Be rigorous when buying in outside PHSE resources

If you have the budget, outside speakers or resources can be a great way to address the topic of mental health in PHSE. However, particularly in secondary schools, there are a lot of different organisations that are trying to claim a chunk of this busy market and, if handled wrong, mental health awareness lessons can do more harm than good.

I have listed organisations who I have seen doing great work in schools on the 'Education Resources' page of my website www.natashadevon.com, as well as charities who can provide unbiased, evidence-based information on the 'Advice and Support' page.

You can find out more about Natasha's work by visiting her website www.natashadevon.com or following her on Twitter @NatashaDevon. Her book *A Beginner's Guide to Being Mental: An A-Z* is available now.

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ACADEMIES FACE UNCERTAIN FUNDING FUTURE



An investigation into the future of academy school finances has revealed that many schools risk running out of money unless

they act now to address the rising costs and reduced revenues.

Mike Giddings, managing director of specialist accountancy firm, MLG Education Services, says many academies are simply not facing up to the stark realities of a changing funding landscape

The introduction of National Fair funding (NFF) in 2020 will see the funding of some schools increase and others decrease because for instance, you get £8,500 per pupil in Tower Hamlets vs £4,500 in Dudley vs an NFF guaranteed allocation of £4,800.

The Government alerted people to the differences between different local authorities back in 2016. However, the grant statements received by academies for 2018-19 are very misleading as the

future changes in funding are hidden in the detail.

The Government messaging focuses on the fact that it has increased funding for education. This means that many schools that use the NFF calculator think that their funding per pupil will be increasing. However, what they are overlooking, is that for highly funded areas such as Birmingham, their annual funding is being kept high by Minimum Funding Guarantees (MFG).

One of the most challenging re-brokering deals that MLG have been involved with was the transition of the five troubled Perry Beeches Academy Trust schools into CORE Education Trust and ARK Academy Trust.

MLG Education Services was appointed by the trustees of Perry Beeches Academy Trust in July 2017 and played a pivotal role in the brokering the deal for the transition to happen. CORE and ARK worked with MLG Education Services to guide the schools to a stronger financial footing and affect a smooth transition during the re-brokerage process.

All the schools left Perry Beeches Academy Trust on 1 March 2018 and joined either the CORE or ARK academy trusts.

Pam Garrington, chair of the Perry Beeches Academy Trust said, “MLG assembled the right people around the table to find the right solution - ie one that was in the best interests of the schools. They acted as a neutral partner to focus all of us on taking action rather than getting mired in internal politics or egos. They addressed waste within the organisation and helped identify ways to optimise resources and put us back on track.

“Mike - and his colleagues at MLG - grasped the issues very quickly and worked with integrity and absolute professionalism at all times. This enabled the schools to transfer to the new trusts and to secure their future for the benefit of the children and young people in their care.”

Adrian Packer CBE, founder and CEO of CORE Education said: “I knew we had to trust in the process to ensure we always did the right thing. Mike at MLG brought clarity to a complex situation where the funding options were limited. He was able to bring a disparate group of stakeholders together by being very straight and clear about what options would be in the best interests

of the students and the future stability of the schools. He was instrumental in keeping the schools running.

“The situation needed strong leadership. Mike’s counsel, his understanding of educational funding and his commitment to work in the best interests of the schools, was invaluable. He was instrumental in helping broker the new trust’s control of the schools and bring the matter to a positive conclusion.

“To have someone with Mike’s expertise guiding us was great. His straight-talking, no-nonsense advice, cut through any concerns and issues and simplified what had become an intense and time-consuming process.

“It is a partnership that continues to focus on achieving financial stability and sustainability for all the schools which are now called Arena Academy, City Academy, City Academy Birmingham and Jewellery Quarter Academy.”

How the transition came together

Mike Giddings, managing director of MLG Education Services added: “Academies need the data and the professional confidence we provide to empower them so that they have complete control over their costs and clarity regards how they best invest to provide excellent educational outcomes long into the future.”

Mike Giddings continues: “The focus was on preventing the tax payer from picking up the bill which would have been morally wrong. We worked hard to ‘unpick’ the finances and the contracts – some of which had been awarded without a robust tendering process. We managed to renegotiate several contracts achieving a future savings for the schools of £1.3 million. This put the schools into a much stronger financial position so that they could transition to the CORE and ARK academy trusts with all the promise of a stable future and the full backing of trustees and the DfE.”

On 24 July 2018, the ESFA informed schools that the MFG would continue in 2019-20 funding year however local authorities could, at the same time, adjust down the funding per pupil by up to 1.5%, about £75 per pupil per year. A large secondary school in Birmingham with 1,500 pupils could therefore see a reduction of £112,500 if the local authority decided to use its power to reduce the income per pupil down towards the £4,800 threshold promised by the DfE.

The result is that some Birmingham secondary schools that receive as much as £5,500 per pupil will receive less, whereas a school in Dudley that currently receives just £4,500 will receive more under Fair Funding.

We consulted with more than 80 academy schools to investigate the impact of changes in funding. The consultation

revealed costs for a typical academy school by 2020-21 could result in funding shortfalls of as much as £135,000 for primary schools or £844,000 for a secondary school.

Spiralling pensions and salary costs

The one certainty that all schools face is that costs will rise. Salaries are predicted to increase by at least 10% in the next three years which, when staff costs typically account for 80% of a school’s budget, represents a significant burden. This will make budgets difficult to balance. Even in areas where funding is due to increase under NFF, the rise will not cover the predicted cost increases.

On 20th July 2018, the Government agreed to fund schools and academies for teacher pay rises over the public sector pay cap of 1%, with teachers pay

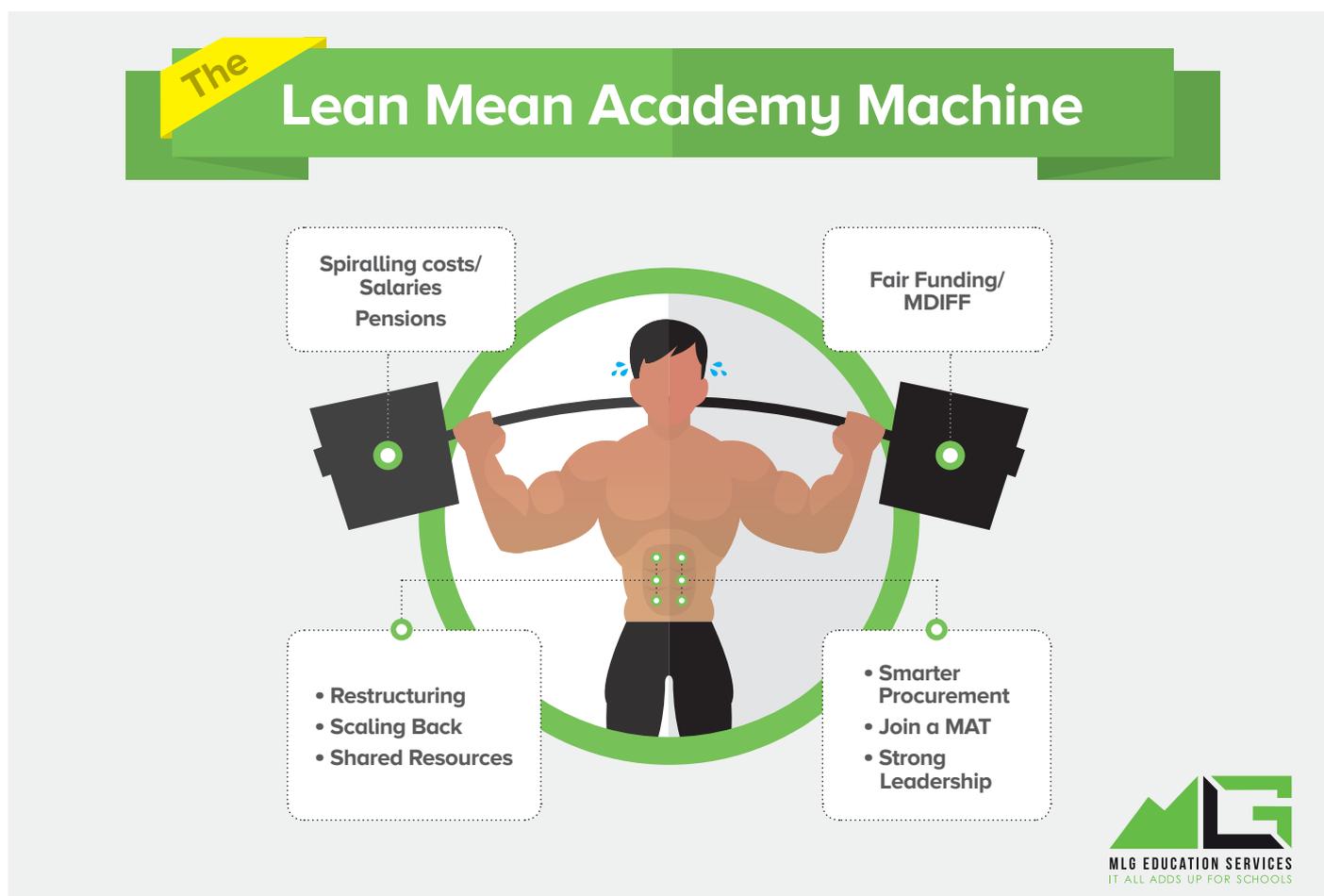
rises confirmed at up to 3.5%. However, these rises will not be fully funded by the Government and schools will need to make up part of the increase.

The worry for schools is that the pay rises will be down to them to fund in the future and that on top of the gross pay rises, they will need to fund increased on costs.

For example, the forecast increases in employer’s contributions to the teachers pension scheme are still to be confirmed, but the prediction from the experts is that this could be a rise of 3.5%, adding £1,400 to the average annual cost of a teacher.”

Facing the future

Academies cannot rely on the status quo. Funding changes are a reality and could adversely impact on their ability to deliver frontline education services unless they take a serious look at how their situation



is likely to change and what opportunities there are to bridge the funding gap.

There are three main routes open to academies to resolve funding issues. They can scale back spending on materials and equipment through robust procurement practices, restructure to create leaner operations and open up the potential for shared resources or join multi-academy trusts (MATs).

In all cases, the key to success is strong leadership and a clear focus on delivering the best possible outcome for pupils and educational attainment.

Too often politics and egos muddy the waters when hard decisions have to be made and for many academies faced with restructuring, it is a complex and difficult challenge but, if done properly, can help save hundreds of thousands of pounds by running senior teams more leanly.

ESFA will fund restructure and recovery plans if they return the school to a reserve surplus so any loans provided by ESFA can be repaid.

When schools join a MAT, it instantly increases the potential for efficiencies which leads to cost savings, greater scrutiny and accountability.

The level of financial and business acumen - needed to negotiate contracts which offer value for money and look for ways to achieve economies - do not always exist in academy trusts.

Academy schools, as with so many other schools, will always face funding challenges, but the sooner they square up to meeting and dealing with those challenges and seeking best practice, the more prepared they will be to ensure a thriving future for their teams and positive educational outcomes for their students.

The major cost that schools and academies need to restructure and control is the staffing resource. Academies are now being asked by the ESFA to ensure that they have completed an 'Integrated Curriculum Finance Plan' (ICFP), to look at their efficiency when it comes to

deploying staff.

Parliamentary under-secretary of state for the school system, Lord Theodore Agnew, wrote to all the audit firms used by academies on 15 June 2018 saying 'a wider awareness of this fundamental tool in teacher deployment is helping many schools. The department has been supporting weaker trusts by raising the profile of ICFP but we believe more trusts could benefit from it.'

The ESFA analyses your ICFP in light of your student to teacher ratio, curriculum costs, the nature of your curriculum, your proposed restructure eg by tackling over-staffing – common savings are with senior managers who teach very little or not at all - before releasing the funding.'

MLG is encouraging the ESFA to better guide academies on their best ways of anticipating changes to their budgets especially regards shortfalls in local authority funding in the medium to long term.



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CLARITY OF PEDAGOGY

Andy Buck believes the benefits for staff and pupils in schools that have a shared pedagogical approach cannot be underestimated

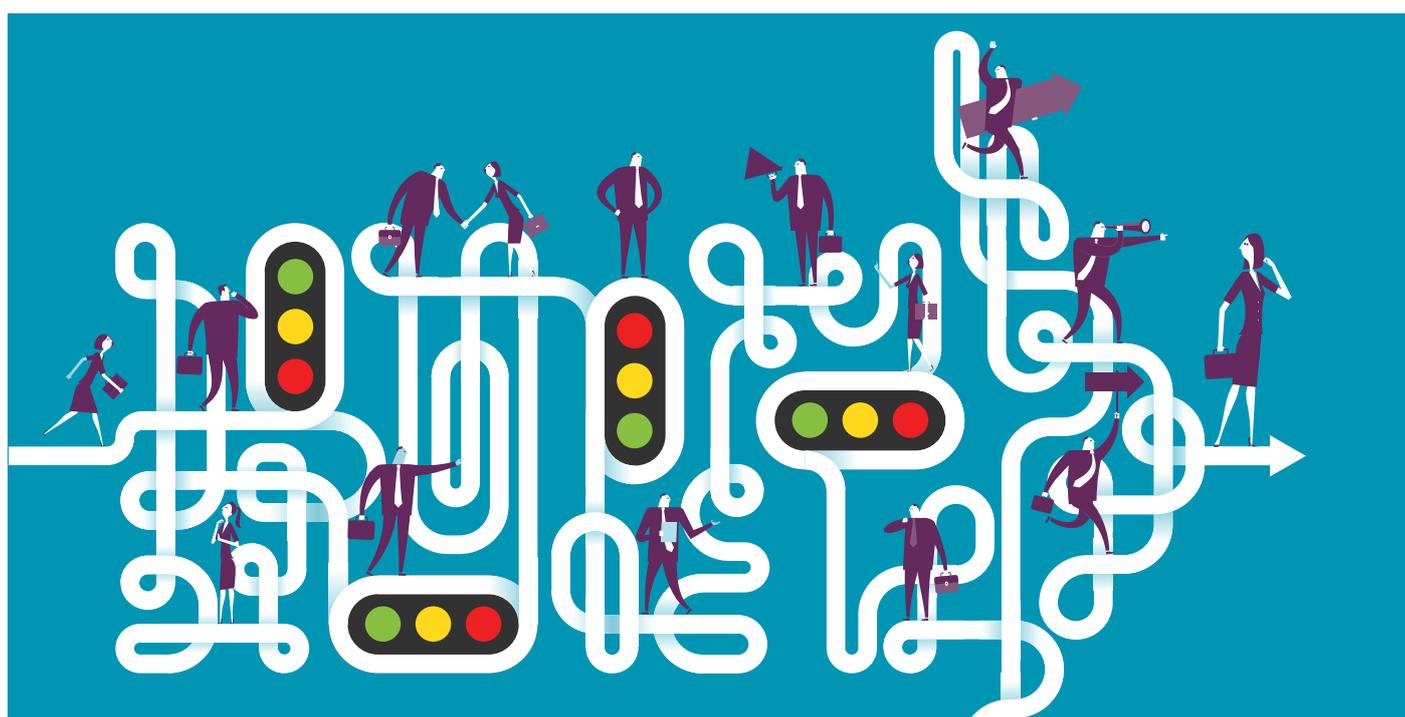
What the most successful schools have done is make sure that every child has a teaching experience that promotes the best possible learning outcomes right across the curriculum, regardless of which teacher they have. They have also managed, by and large, to ensure the job of the teacher is manageable. To achieve this, schools have often undertaken an internal debate: Should our school have an overall pedagogical framework?

This is not an easy question to answer. The first part of the debate centres on whether it is desirable to have a shared whole-school approach to pedagogy in the first place. Some would argue that

teachers should be free to develop their own approaches to teaching. After all, most teachers have their preferred default teaching methods which probably reflect how they were taught themselves, their initial teacher training and possibly their own preferred way of learning (which often leads to an unconscious tendency to assume that others learn in the same way). Shouldn't the teacher be allowed to concentrate on these areas of strength? By allowing teachers the professional freedom to plan and deliver lessons in their own way, the assumption is that the quality of teaching and learning will be higher.

This may be true to a certain extent,

but many successful schools have recognised a number of problems with this approach. Firstly, the quality of planning and resourcing that one teacher can bring to the range of classes they teach is a limiting factor in itself, particularly if there is an expectation that they are supposed to be putting in place an individualised programme in order to meet the needs of each pupil. Put simply, the task is unmanageable. There are just too many classes, and too much planning and preparation necessary to create the outstanding lessons needed on a consistent basis. This individualised approach also ignores the fact that there may be ways to teach particular skills or





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knowledge sets that may not be reflected in the individual teacher's repertoire or own experience. In these circumstances there are two possible outcomes: either teachers feel overworked, disenchanted and leave the profession, or they start to cut corners in the name of self-preservation. Clearly, neither of these outcomes is desirable, and certainly don't lead to the creation of the great schools this publication is all about.

Collaborate

What these schools have done is recognise that it makes much more sense for teachers to work together collaboratively to produce high quality schemes of work for everyone to use. This planning also needs to take a realistic and evidence-based approach to meeting individual pupil need. Not only does this bring obvious benefits in terms of sharing the workload, it means the quality of teaching and learning will be based on lessons that are planned around a shared view of the best way to teach something. It also provides the opportunity for those teachers to meet after something has been delivered, share their reflections on what went well and what didn't and make alterations.

To make this shared planning most effective, the best schools have developed a clear view of what makes good teaching. This again presents schools with a major challenge. Any teacher will tell you how fast prevailing pedagogical fashions can change. For example,

the debate between child-centred or whole-class teaching is always on the agenda, as is the skills versus knowledge debate. In my view, these are often false dichotomies. Great teaching will involve both great explanation and modelling by teachers who have excellent subject and curriculum knowledge, as well as opportunities for pupils to deepen their understanding and be able to recall what they have learned in a sophisticated and meaningful way.

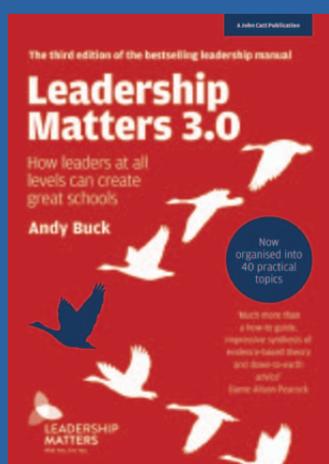
Superhuman

Then there are practical considerations, particularly as we know teacher retention will always be a key issue. The most successful schools have recognised that teachers are not superhuman. The leaders of the very best schools do all they can to make the teacher's job as manageable as possible, recognising time constraints and practical classroom issues. But at the same time, they make sure that what is created gives teachers the best chance to meet the needs of all their pupils. As a result, some schools have now set out their broad approach to pedagogy very clearly. Doing so has provided these schools with the opportunity to frame planning around a shared approach that is flexible enough to meet the needs of all the pupils, play to individual teacher's strengths and allow the different approaches that the range of subjects need. This approach is about creating a framework, not a straitjacket. It provides a pedagogical bedrock upon which pupil and teacher creativity,

experimentation and individuality can thrive.

For example, some schools I have worked with recently have highly developed policy and practice on assessment for learning that has originated from the seminal work of Dylan Wiliam and Paul Black (1998). Another had focused on the importance of developing learning through quality dialogue as described by Robin Alexander (2004) in his work on dialogic teaching. One school has developed a simple summary of what a good lesson looks like. In another, where consistently delivered high quality teaching is at the heart of its approach, every classroom has the teaching framework on the wall. Both staff and pupils know and understand what is expected, and this helps ensure clarity and consistency from all.

Whatever the origins, the benefits for staff and pupils in schools that have a shared pedagogical approach cannot be underestimated. Not only do teachers have the security of knowing they are working in a collaborative way with their colleagues, even those in other subject disciplines, but pupils too can benefit from developing their own sense of how they fit into the pedagogical approaches as individual learners. Priority given to developing staff and pupils is a key feature of the most successful schools, and the clarity a shared pedagogy can bring can be of great benefit in helping to achieve this.



Andy Buck has founded two organisations: Leadership Matters and #honk. Both aim to improve the educational outcomes for pupils by supporting great leadership development. Leadership Matters is a web-based membership organisation that offers school leaders access to high quality online development tools, videos and leadership articles.

#honk is the organisation through which Andy works directly with educational leaders on executive coaching, team development, training and conference keynotes. His website honk.org.uk also offers hundreds of free-to-download leadership resources.

Leadership Matters 3.0 by Andy Buck is published by John Catt Educational. Available from JohnCatt.com, Amazon and all good bookstores.

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THE ACADEMIES FINANCIAL HANDBOOK 2018 - KEY POINTS FOR TRUSTEES



Gillian Allcroft, Deputy Chief Executive, asks MATS to consider the ‘Nolan Principles’ when considering executive pay

It’s September so it must be that time of year when the new Academies Financial Handbook (AFH) comes into force. This year the document was ‘launched’ at the NGA’s Summer Conference on 9 June, by no less than the Secretary of State. There are a few headline changes this year, in relation to:

- Related party transactions
- Executive pay
- Management Accounts

Related Party Transactions

The first two have been perennial headaches for the Department for Education (DfE) and the Education and Skills Funding Agency (ESFA). The first attempt at tackling the issue was the

introduction several years ago of the ‘at cost’ provisions into the AFH. NGA’s view has always been that such transactions should where possible be avoided and that the ‘at cost’ provisions can lead to the impression as long as they are done at cost they are fine, when they might not be. The Public Accounts Committee (PAC) has returned to this issue multiple times, most recently in March 2018 on the back of scrutinising the Academies Sector Annual Report. Its conclusion was fairly stark: “the Department for Education’s rules around related party transactions are too weak to prevent abuse”. As a result of this it recommended that the DfE tighten its rules so as to require that trusts seek approval before entering into related party transactions.

www.parliament.uk/business/committees/committees-a-z/commons-select/public-accounts-committee/news-parliament-2017/academy-schools-accounts-report-published-17-19/

The DfE ruminated on the recommendations and concluded that it was impractical for it to approve every

single related party transaction. It has, however, considerably tightened up the regime. For transactions entered into from 1 April 2019 academy trusts will need to notify the ESFA of all related party transactions, in advance of them taking place and, more crucially, seek approval for any that amount to more than £20,000 in a single transaction or cumulatively over the year.

While existing transactions will not fall under the new regime, trusts need to be aware that scrutiny will not go away and, in line with the Nolan principles, trust boards should consider whether they need to change their approach.

In speaking at the NGA’s Summer Conference, the Secretary of State said “Of course, some related-party transactions are perfectly legitimate and represent good value for money, but I think pretty much everyone would agree that a situation where board members could simply hand out contracts to companies that they or their family and business contacts have an interest – that is not okay”.

AFH on Executive Pay

The board of trustees must ensure its decisions about levels of executive pay follow a robust evidence-based process and are reflective of the individual's role and responsibilities. No individual can be involved in deciding his or her remuneration.

The board must discharge its responsibilities effectively, ensuring its approach to pay is transparent, proportionate and justifiable, including:

- process - that the procedure for determining executive pay is agreed by the board in advance and documented
- independence - decisions about executive pay reflect independent and objective scrutiny by the board and that conflicts of interest are avoided

- decision-making - factors in determining pay are clear, including whether performance considerations, and the degree of challenge in the role, have been taken into account
- proportionality – pay is defensible relative to the public sector market
- documentation - the rationale behind the decision-making process, including whether the level of pay reflects value for money, is recorded and retained
- a basic presumption that non-teaching pay should not increase at a faster rate than that of teachers, in individual years and over the longer term
- understanding that inappropriate pay can be challenged by ESFA, particularly in any instance of poor financial management of the trust.

Executive Pay

In launching the AFH 2018 at the NGA Conference the Secretary of State said

“So I want to urge all trusts to take a lead here and bear down on excessive salaries – you have our backing on that. In fact my department is today setting out clearer expectations around executive pay so you have the guidance you need.”

The wording in the new AFH around setting the senior executive's pay has been expanded. There is nothing outrageous in the bullets contained in paragraphs 2.43 and 2.44 of the document, they simply require trusts to have a transparent process for setting the senior executive leader's pay which is based on a clear consideration of her/his roles and responsibilities. The difference is, now that the bullets are set out as a must in the AFH, the ESFA has rather stronger grounds for intervention than previously – as Funding Agreements require you to follow the provisions of the AFH and failure to do so technically involves breach of your Funding Agreement.

Management Accounts

The final change has caused a flurry of concern amongst some business managers and trustees, although I confess I am

slightly baffled as to why. The document sets out some new requirements as what financial information should be received by trustees and how often.

All trusts boards are required by their articles of association to meet three times a year, many in fact meet more often than this. The document says that if 'larger' trusts don't meet more than three times a year they should consider doing so. What 'larger trust' means isn't actually defined in the AFH so it's up to individual boards to decide whether they qualify. What is new is that it requires all trusts which meet less than six times a year to describe in the governance statement to the accounts how they maintain effective financial oversight with fewer meetings.

What does that mean? Consider it a prompt to review your practice – do you carry out your responsibilities for financial oversight well? If you are confident in your systems and processes, and governance structures, including board committees then fine, you just need to explain that in the governance statement. In most boards really detailed scrutiny of the finances will be carried out by the finance committee and reported back at full board meetings. If you are satisfied that is going well you don't need to rip your existing structure up.

The other bit that caused a kerfuffle is

the idea that the management accounts must be prepared every month 'setting out its financial performance and position, comprising budget variance reports and cash flow forecasts with sufficient information to manage cash, debtors and creditors'. These must be sent to the chair of the trustees every month, all other trustees at least six times a year and should be discussed by trustees at their meetings.

Clearly this is an expansion on the text of the AFH 2017, which states that the internal control framework must include 'preparation of monthly budget monitoring reports', but I must confess to struggling to understand why this isn't already practice. To be honest, my niggle is with sending the accounts to the chair of the board, whereas I'd have plumped for chair of finance, but that's a minor niggle.

At different times of the year the management accounts will be less 'interesting' than at other times because it's the beginning of the financial year and there isn't much to report in relation to variance against budget. Trustees, in conjunction with the senior executive leader and business professional, need to determine what information is necessary to include and whether at certain times of the year more or less accompanying narrative is required.

Which brings to us to the other requirement that trustees 'must consider' the management accounts at full board meetings. NGA's induction handbook Welcome to a Multi-Academy Trust has taken this as read stating 'as a matter of course trustees should expect to receive for every meeting the latest management accounts'. As charity trustees every single member of the governing board has a responsibility to ensure the charity's resources are managed responsibly, if they don't understand the management accounts – difficult to see how they can claim to be meeting that duty.

Yes, some trustees will be more financially skilled than others but every single member of the board should have clear understanding of the financial position of the trust, and should be provided with training and development if necessary.

BEING STRATEGIC

Ensuring clarity of vision and strategic direction is one of the three core functions of governing boards. To assist governors and trustees in their strategic role, the National Governance Association and Wellcome have published *Being Strategic: a guide for governing boards*, three years after the popular original guide – a *Framework for Governance* – was released.

Following extensive feedback and consultation with governors, trustees and senior leaders and drawing on practical experience and real life examples, *Being Strategic* offers a robust annual cycle for creating, monitoring and reviewing strategy. It provides advice, poses questions for governing boards on each stage of the cycle, and supports school leaders in taking a broad and long-term perspective. The updated guide has been written to offer leaders in all settings, including MATs, a framework that they can use to set a strategy for their organisation.

During the research stage of creating *Being Strategic: A guide for governing boards*, NGA was fortunate to speak with

many experienced trustees about how they approach the first key function of the governing board: ensuring strategic direction, vision and ethos. One of the key things identified was the central importance of values when taking a strategic approach. Values, communicated and understood by all in the trust community, can help smooth engagement with pupils, parents and staff by providing a common reference point for all decisions taken, whether those governing centrally or through what has been delegated at a local level. Some boards produce an annual report on the work of the trust board for parents structured around the values of the trust and its schools.

Governing boards have a key role in ensuring trust in decision making in schools. To do this effectively, they must live their values (with regard to the 7 Nolan Principles) and be willing to challenge any unethical behaviours in the interest of pupils. This includes trustee board decisions on CEO pay, a topical subject first discussed by Gillian Allcroft in this blog and in the summer edition of *Academy Magazine*.

Set your own priorities

One of the key messages to come out of last summer's NGA/ TES survey was that the pace of policy change is challenging for schools. A representative comment from the survey was that: "A period of stability would be appreciated so that schools can plan forward with some certainty." So when should school leaders commit to the next new initiative and incorporate it in the strategy as an improvement priority? Russell Hobby's article on the "art of strategic procrastination" springs to mind. Hobby asks, how can school leaders ensure long-term, sustained improvement in a system characterised by "frenetic, short-lived cycles of reform"? His answer is to assess any new policy against the school values and ask: do they align? If so, go

for it but make the policy relevant and meaningful to your school. If not, don't feel pressured to make any immediate changes (but of course – do follow changes to statutory policy!)

Going further, the principle of prioritising and monitoring that which matters to your trust community and aligns with your values, with the schools within the trust, is a key aspect of the new guide – we call on school leaders to not be limited by narrow academic performance measures but to set improvement priorities that consider the whole education offer.

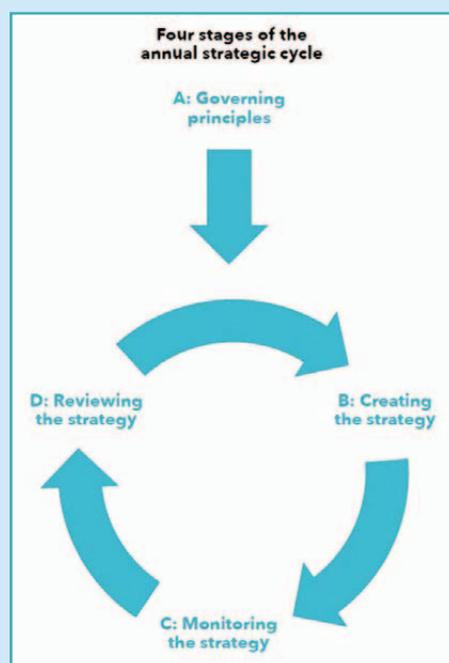
Another vital consideration is staff wellbeing; do not to create bureaucratic systems of measurement that add to staff workload. It is essential that all staff are involved in the development of strategic improvement priorities and any monitoring and reporting arrangements from the outset to ensure that measures are agreed, intelligent and purposeful.

A day out to take the long view

A simple insight, but one that bears repeating when it can often feel like that there are simply not enough hours in the day. Taking out a whole day to develop and articulate the long, medium and short-term goals of the school or trust is crucial and will pay off during busy times when firefighting can take focus away from achieving long-term the vision. The strategy day should bring everyone together and must consider all ideas, approaches and opportunities. Executive leaders may wish to hold a separate staff strategy day and bring these insights to the governing board strategy day – whatever works for best for your school or trust.

NGA has further support and training available on *Being Strategic* - visit the NGA Consultancy and Training pages for more information.

Shelby Roberts



LEARNING LESSONS FROM OTHERS: NGA MAT CASE-STUDIES

Tom Fellows (Senior Research Lead) and Fay Holland (Senior Policy Officer)

NGA hear of new and established multi-academy trusts (MATs) encountering similar issues and often needing to adopt creative ways of overcoming the problems they face, yet all too often they do this behind closed doors. This means that MATs up and down the country are having to figure out the best approaches to common problems in isolation rather than learning from others who have been through the process before.

Facilitating this learning is the purpose behind our Community MATs network for trustees and clerks and, to the same end, NGA has created a series of case studies exploring the lessons that MATs have learned since they were created. So far, this series has focused on three trusts – the Evolve Trust, the Spring Partnership Trust and the Oxford Diocesan Schools Trusts – with another set of cases to be written in the 2018/19 academic year.

Exploring MATs in different contexts

The MATs explored through this project were situated in different areas of the country and were diverse in terms of size and phase. Yet there are a number of similarities in the journey of each – particularly for the Spring Partnership Trust and Evolve, with both MATs emerging out of single schools.

For both the Spring Partnership Trust and Evolve the motivation for starting a MAT revolved around moral purpose and a desire to help other schools in need. The Spring Partnership Trust was established in 2014 when an Ofsted rated

‘good’ primary school sponsored another primary in the local area. Similarly, Evolve was also set up in 2014 when a ‘good’ secondary school in Mansfield initially sponsored a struggling special school. The Oxford Diocesan School Trust was also established in response to the need to support particular struggling schools but this time by the Diocesan Board of Education.

Between 2014 and 2016 the Spring Partnership Trust grew rapidly from two to six schools whereas Evolve took on only one more primary school in 2015. Growth of the Spring Partnership Trust was largely driven by an understanding that, if the trust wanted to use its preferred management structure, this was financially unviable with only two schools. Furthermore, the executive headteacher had gained an excellent reputation in Bromley through her school improvement work and trustees recognised the benefit of creating formal partnerships with these schools. In contrast, the growth of Evolve was largely driven by the regional schools commissioner who persuaded the trustees and executive leaders that they could make a difference in the local area.

The Oxford Diocesan School Trust has grown rapidly since being established in 2012; it was the fastest growing MAT in the country in 2017 and currently encompasses 32 schools. The chair related that a conscious decision had been made to move on from its origins as a ‘hospital MAT’ for schools in need of support and bring in better performing schools to provide more capacity for school-to-

school support. This has meant that the trust has had to adapt to the differing needs of these schools.

Governance learning points across the three MATs

Over time, all three MATs have learned significant lessons in terms of effective governance. Both the Spring Partnership Trust and Evolve originally had very central governance structures. When the trust was first established, Evolve also had substantial overlap between the layers of governance and executive leadership. Over time, however, trustees of both MATs have recognised the need and benefit of ensuring no overlap across the layers of governance and management and have delegated more responsibility downwards. However, in doing so, both Evolve and the Spring Partnership Trust have also recognised the need to set up more robust channels of communication across the trust. For the Spring Partnership Trust, this has been done through regular meetings between the chairs of academy committees and the chair of trustees. The Spring Partnership Trust has also assigned ‘link’ trustees to each academy committee. Similarly, Evolve has also set up the ‘chairs symposium’ and ‘headship institute’ which includes representatives at both school and trust level to share important information and to feed into the business of the trust board.

Bringing chairs and local governors together for information events and training is also a strategy employed by the Oxford Diocesan Schools Trust. It

has a much higher level of delegation to its 'local governing bodies' than the Spring Partnership Trust or Evolve but the trust board and executive team retain oversight, for example by working with local governing bodies to scrutinise budgets and benchmark between the schools.

As well as getting the governance structure right, the Spring Partnership Trust has also learned that, with growth, the skills needed at board level change significantly. The trust are currently doing more to ensure that they can recruit trustees with the experience of managing

large organisations. The Oxford Diocesan Schools Trust had a number of trustees with this type of high level experience but emphasised that training was still vital to ensure they understand their schools and the wider education landscape. There is also an acknowledgement that the time commitment amongst some trustees is too large, with the chairs of both the Spring Partnership Trust and the Oxford Diocesan Schools Trust spending roughly three days a week on governance. Similarly, recognising the burgeoning responsibilities of the board of trustees, Evolve has looked to spread the workload

across the different governance layers – with the trust board having a very structured and 'high-level' remit. Evolve treat their local academy committees as the 'eyes and ears' of the trust. The work of the academy committees, as outlined in the scheme of delegation, allows them to delve into more detail than trustees which is then fed back through the various communication channels. Evolve has also done much to clarify the role of members – working on giving them a clear purpose which does not overlap with the responsibilities of the trust board.





Creating a sustainable and well managed MAT

As well as lessons around governance, both Evolve and the Spring Partnership Trust learned valuable lessons around growing an effective and well managed organisation. This includes putting into place mechanisms to move schools away from the 'single school' mind-set to one of collective endeavour and ensuring that all schools in the MAT see themselves as part of the whole. Amongst other things, this involves establishing a clear vision and attracting likeminded schools who can "buy-in" to this wholeheartedly. The Spring Partnership Trust outlined that it was about being organic with growth and being clear with prospective schools about what they would need to give to the MAT and, in return, how they would benefit. For Evolve, clarifying what the MAT stands for has also allowed the trust to be more resilient to external influence and to ensure that growth is

carried out sustainably and in a way that it is beneficial to each of the member schools. The Oxford Diocesan Schools Trust outlined that, though the core principles of the MAT had remained the same throughout its growth, it took effort to ensure they were embedded in every school and this was a continuous task.

Both Evolve and the Spring Partnership Trust have needed to manage the expectations of individual schools, particularly around finances, with both needing to ensure that no school feels that they have 'given more' to the trust as a whole. Both the Spring Partnership Trust and Evolve work closely with their schools to overcome any issue that may arise. However, the Spring Partnership Trust stressed the importance of having a single 'executive leader' across the trust with the ability to make tough decisions where necessary.

On a final note, all three trusts have learned that being in a MAT can help drive school improvement. The Oxford

Diocesan Schools Trust has developed a team of school improvement advisers who visit each school six times a year and provide more intensive tailored support where there is concern about performance. With the reduction in provision from the local authority, many of the small rural schools in the trust are no longer able to access school improvement services elsewhere. The Spring Partnership has managed to produce financial systems which were not possible before the MAT was created and achieve economies of scale for things like auditing costs and large scale projects. Evolve has particularly benefited from the school-to-school support born out of being in a MAT through the "Evolve alliance". Both Evolve and the Spring Partnership Trust have also found being in a MAT useful for staff retention as the trust has provided avenues for career progression not previously available when the schools were standalone organisations.

NGA & TES ANNUAL SURVEY: INSIGHTS FOR ACADEMIES

A fascinating insight into the often under-examined world of school governance...

In the summer term of 2017/18, the National Governance Association surveyed the nation's governors and trustees in partnership with *Tes* magazine. The results give a fascinating insight into the often under-examined world of school governance, shedding light on who is sitting on boards and how they are carrying out their role. While many of the findings are general to all schools, some are particularly of interest to academy trusts.

There were some demographic differences between the respondents governing different types of schools: fewer respondents governing single academy trusts or multi-academy trusts (MATs) were under 30 (6% and 7% respectively, compared to 11% of maintained school governors) and more of the MAT trustees responding were over 60, 48% compared to 37% of maintained school governors. The lack of ethnic diversity among those governing academies was similar in all school types; visit www.nga.org.uk/everyone-on-board to find out about NGA's campaign to increase the participation of people from ethnic minorities and young people in school governance.

From the survey responses, there appear to be more men governing MATs than other types of school, with 53% of MAT trustees giving their gender as male compared to 37% of maintained school governors and 43% of single academy trust trustees.

Single academy trusts tended to have the largest governing boards of all school types: 24% had 16 or more trustees and,

by contrast, just 3% of multi-academy trusts (MATs) had boards of that size. MATs tended to have the smallest boards, with 57% having 10 trustees or fewer.

Single academy trusts were also more likely to have a larger number of committees, with 13% saying that they had five or more compared to 7% of MAT trustees saying the same, although academy committees (often called local governing bodies) were excluded from the question. The fact that single academy trusts tend to have larger boards and committee structures raises interesting questions about the

Spotlight on MAT governance

80% of MAT trustees told us their MAT has an academy committee (sometimes known as a local governing body) for every school, while 9% had them for some schools or clusters of schools. 7% said they do not have academy committees while the remainder having a mix of those options.

Encouragingly, just 2% of respondents told us that they do not have a scheme of delegation that all trustees and academy committees are aware of – but it is concerning that 7% did not know whether this existed in their MAT. Even among the 91% who said that they did have a scheme of delegation, we know from talking to trustees at our Community MATs meetings and elsewhere that just having a scheme of delegation does not guarantee that it is being followed and that often these can be very long, legalistic documents which do not lend themselves to the workings of the board.

Promoting separation between the layers of governance is a key priority for NGA when it comes to improving the governance of MATs, as we have often seen trouble caused by the same people sitting on different levels, effectively responsible for holding themselves to account. The responses to our survey suggest that there is a considerable amount of work still to be done on this, as 72% of MAT trustees who responded said that there was at least one trustee who was also on academy committees and 73% said that there were trustees that were also members of the trust.

Although there was a slight increase in the proportion of MAT trustees telling us that they do not plan to expand the number of academies in their MAT, from 4% in 2017 to 7% in 2018, our findings suggest that there is still considerable appetite for growth among MATs: 68% planned to increase the number of academies in the trust while a further 23% said that they would consider expansion if a suitable school were interested.

Overall, the priorities for those governing academies were common with those governing other types of schools, with balancing the budget and attracting and retaining high quality teaching staff most frequently cited as the most important issues facing respondents' schools.

The full report of the survey will be available from www.nga.org.uk

INFLUENCING THE BOARD – LOCAL GOVERNANCE IN MATS

Sam Henson, head of information, says getting local governance right poses a unique challenge for MATs



In a multi-academy trust (MAT) the board of trustees is legally accountable for the decisions made in their academies. However, this does not mean the board itself is required to make all of those decisions, with decisions often delegated locally. While local governance can take many forms, the most common is the ‘academy committee’ model. Although widely referred to as ‘local governing bodies’, NGA prefer the term academy committee to differentiate between them and maintained school governing bodies and to reflect the reality that the academy committee is not always going to be governing in the truest sense of the word.

Based on evidence from NGA’s advice and consultancy services, as well as insights from a series of NGA MAT case studies, it is apparent that getting local governance right poses a unique challenge for MATs. Here we focus on some of these challenges, outlining what MATs should consider when thinking about the roles and responsibilities of their local governance tier.

Is local governance necessary?

Many MATs have found themselves debating both the need and the responsibilities that should be delegated

to the local governance tier within their trust. Inevitably, delegation to a local level will vary from trust to trust, depending on size (both in terms of the number of pupils across the MAT and the number of schools), the way in which the leadership is structured, the trusts geographic set up and the performance of the schools within the trust. However, MATs do not always need to have academy committees and should only do so if they improve governance across the trust.

The smallest (and indeed some larger) trusts may find themselves in a situation where they do not actually have a need for academy committees in each school. NGA has encountered situations in the past where empty MATs, by definition consisting of just one school, have put in place overly complex and large governance structures, with members (a non-negotiable), a trust board (also a non-negotiable), trust board committees and an academy committee. A single school trust operating with four governance tiers is questionable to say the least and begs the question: when do MATs actually need to start introducing additional governance layers and for what purpose?

Consider different models of local delegation

All MATs are different and the trust board is not restricted to sticking with any one particular model of local governance. Instead, it should look to create a flexible model which is able to adapt to changing contexts.

Initially most school leaders and trustees want to make sure that the MAT remains rooted within the community it serves. But a committee in each school is not always the best option to ensure that this happens. Especially in small, geographically close MATs, governance without local academy

committees is entirely possible, it’s what many maintained federations do. This may even benefit the trust, especially where recruitment to local academy committees is difficult.

Yet, particularly as a MAT gets bigger, it is often desirable to rethink centralised governance structures. As several of the MATs explored through NGA’s case study series grew, the trust boards simply could not know all of their schools well without the help of the academy committees. Indeed, there is a balance to be found in the trust board retaining a strategic role while not getting weighed down by excessive information and operational matters. However, even when a trust board decides that local governance would be beneficial, there is more than one option on the table. Those governing larger MATs can have committees overseeing more than one school within hubs or regions. Several of NGA’s case study MATs had either adopted this model to accommodate growth or were considering it for the future.

Regardless of which model of local governance is adopted, it is important that the trust is open to the possibility that the governance model and structure is likely to change as the organisation evolves, both as it develops and in response to any changes in educational policy and direction. For several of NGA’s case study MATs, changes to the governance structure were an essential component of sustainable growth. There is nothing wrong with accepting that what is delegated down to local governance in the beginning may not necessary be the same in two years’ time.

The purpose of local governance

This should be part of the ongoing strategic discussions of the MAT



governing board, what is the best governance structure to help us achieve our vision. That may or may include local governance at every school in the MAT.

When local governance is in place, however, NGA's consultancy work and case studies series suggest that the most common roles delegated to a local level are monitoring pupil progress, monitoring strategic priorities and engaging with local stakeholders. This usually revolves around one or a mixture of the following:

1. to monitor
2. to scrutinise
3. to represent
4. to consult

While a specific monitoring role will ultimately depend on what is delegated downwards by the board of trustees, academy committees are well placed to assess whether the school is working within agreed policies, meeting agreed targets and managing its finances well. NGA's case studies revealed that academy committees have the ability to scrutinise delegated areas in greater depth than the trust board and to 'feed' information up to the trustees in a timely and succinct manner. Furthermore, in terms of 'representing' the trust and 'consulting' with others outside of the MAT, another key area for academy committees is engaging with stakeholders. NGA

would argue that as academy committee members are embedded within their local contexts, they are well situated to engage with pupils, parents, school staff and the wider school community.

Within each of these areas, the trust should consider how and when the academy committee reports to the board. Again this sounds easy, but local governance often reflects a huge cultural change for schools and the board should ensure that it invests time in identifying reporting lines that work for all involved in governing and managing a MAT. An increasing number of trusts are starting to step away from a model where they rely solely on minutes. While official minutes of meetings are crucial, they will not always capture the essence of the academy committee's voice. Instead, some trusts have a system where they produce a simple one page document outlining the key messages they want to communicate across the MAT. Others, such as those identified through NGA's case studies, set up regular meetings between the chairs of each academy committee and the chair of trustees.

Communicating roles and responsibilities effectively

On a final point, while it is clear that academy committees can and do have an important role to play this is not always

communicated clearly across a MAT. Whatever approach to local governance is taken, MAT trust boards will need to be proactive in raising awareness of the role of local governance and its limitations. It is vital that the actual decision to delegate is made by the trust board and then recorded within the trusts scheme of delegation. This means that the trusts delegation to a local level will need to be clearly explained and all parties need to be reminded that, as a committee of the board, delegation can be removed at any time.

It is also important to remember that local governance models represent a fundamental change for those who previously governed in a maintained school governing body. In the past, this has led some to question whether they would want to govern at local level in a trust given the reduced power. However, if not confused with the role of the trust board, and executed correctly, local governance presents an opportunity for MATs.

Not only does it provide an extra layer of oversight, but it is an opportunity for ambassadors of the trust to be more involved with stakeholders and for those at a local level to have a monitoring and consulting role that improves governance and contributes to good outcomes for the young people that the MAT serves.

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T: 0121 456 1613

WHY THE ENGAGEMENT OF YOUR TEACHERS SHOULD BE A REAL PRIORITY..

In an extract from her excellent new book, Mandy Coalter says staff engagement can easily be measured by a regular employee survey



Research in to teacher retention published by NFER (Lynch, Worth, Bamford, and Wespieser, 2017) demonstrates the huge impact employee engagement has on retention rates. Only 10% of engaged teachers are considering leaving the profession yet the figure leaps to 74% of disengaged teachers. Given this impact, for any school leader the engagement of your employees ought to be a real priority.

So what is employee engagement? Over the past decade, there has been a move across many sectors to build employee engagement to deliver business results. In 2009 a major review of

employee engagement and its impact on performance across the UK economy was commissioned by the Government and led by David MacLeod and Nita Clarke.

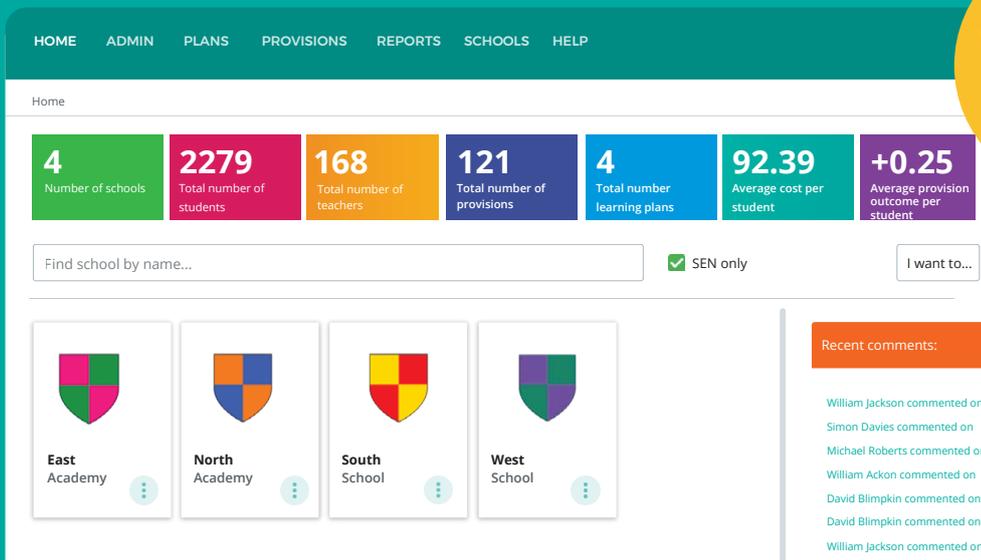
As a recession was biting, the then Secretary of State for Business, Innovation and Skills, Lord Mandelson, wanted to examine whether a wider take up of engagement could positively impact on the UK's performance and competitiveness, and the report's answer was an unequivocal yes (MacLeod and Clarke, 2009). The review highlighted some dramatic results:

- Disengaged workers cost the UK £44 billion a year in lost productivity.

- Stock market performance of Sunday Times 100 best companies was ten times higher between 2000 and 2005 than for the FTSE 100 overall.
- Improving engagement correlates with improved performance as evidenced in organisations such as Sainsbury's, John Lewis, Toyota and Standard Chartered Bank.

Across many public and private sector organisations, investment and pursuit of employee engagement is commonplace given the now widely accepted view that engaged employees will deliver discretionary effort and go the extra mile

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to deliver for customers and the business. Furthermore, engaged employees are much more likely to be active advocates for the organisation and their view of what it is really like to work there is far more effective than any paid advertising or PR.

Think about how important it is for staff in your school to put in discretionary effort and be advocates of your school in the local community.

There is no one commonly accepted definition of employee engagement but the MacLeod review described it as: 'A workplace approach designed to ensure that employees are committed to their organisation's goals and values, motivated to contribute to organisational success, and are able at the same time to enhance their own sense of well-being. Engaged organisations have strong and authentic values, with clear evidence of trust and fairness based on mutual respect, where two way promises and commitments – between employers and staff – are understood and are fulfilled.'

This is easily applicable to a school context and provides a good starting point for school leaders striving for an engaged workforce. For many years I have worked with Ipsos Mori to measure employee engagement, in both the school sector and the NHS. I think the components they use to build a picture of employee engagement in their surveys are accurate and well thought through. They focus on measuring engagement through questions on:

- Alignment – are employees aligned with leadership of the school and are they clear about the purpose, vision and values?
- Involvement – are employees involved in decisions that affect the school and do they have the opportunity to influence these and have a say?
- Loyalty – are employees planning to stay at the school? Do they see a career path and long-term future there? Are employees advocates for the school and would they recommend it as a place to work or to send their own children?

You can test employee engagement by asking specific questions focused around these three areas. For any school leader, I think the most telling questions to ask are:

- Would your employees recommend your school as a place to work?
- Would they recommend your school to friends and family as a place to send their children?

The answers to these will tell you an awful lot about the engagement and advocacy of staff.

In my experience of working with schools on engagement surveys over several years, there are a number of practices in a school that correlate with high employee engagement:

- The ability to plan work together collaboratively.
- To be able to observe and learn from others.

- All staff are able to talk about teaching and learning.
- Leaders have high expectations of the staff and pupils.
- Teachers have the freedom to teach what they are passionate about.

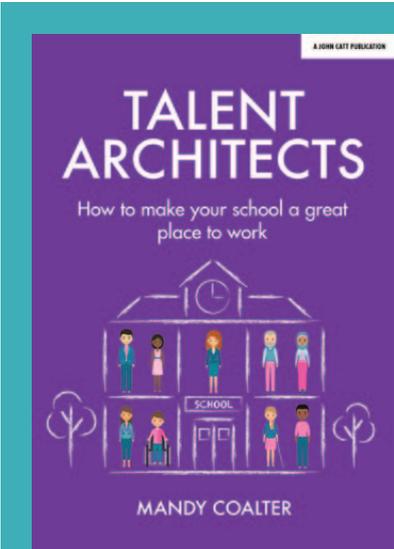
In his book 'First break all the rules' Marcus Buckingham sets out the crucial role middle leaders play in making any business a great place to work. Utilising significant global research undertaken by Gallup, he sets out the top 6 questions in employee surveys that have the strongest link to the most business outcomes.

These are (in priority order):

1. Do I know what is expected of me at work?
2. Do I have the materials and equipment I need to do my work right?
3. Do I have the opportunity to do what I do best every day?
4. In the last seven days, have I received recognition or praise for good work?
5. Does my supervisor, or someone at work, seem to care about me as a person?
6. Is there someone at work who encourages my development?

Employee engagement and these other areas can easily be measured by a regular employee survey as well as focus groups. I always recommend using an external survey to gauge views if you can, as people are far more likely to be honest and open when they have confidence that the process is truly anonymous. When moving from an in-house survey to an external one, I saw a leap in completion rates from 46% to over 80%. Many organisations are now moving away from the annual long employee survey to more continuous feedback from staff and are looking at specific groups of employees such as new joiners, leavers, teachers and support staff. This can be done through short online 'pulse' surveys or via apps.

There are many providers at varying costs that can assist with this and often it is not as expensive as you might think. Given the impact of engagement levels on staff retention it is well worth the investment.



Talent Architects: How to make your school a great place to work by Mandy Coalter is published by John Catt, £12.

A graduate in Law, a Fellow of the CIPD and a trained Executive Coach (ILM7), Mandy joined United Learning in 2012 where she developed a 5 Year People Strategy. The United Learning HR team won the Chartered Institute of Personnel and Development 'HR Team of the Year' in 2016. HR Magazine listed Mandy in the top 40 'HR Most Influential' in 2017 and she was shortlisted for the HR Excellence Awards 'HR Director of the Year' 2018.

THE RUSH TO CONSOLIDATE

Kevin Hodgetts, education partner at the Birmingham office of Haines Watts, predicts that more SATS will become part of MATS - and reviews what they need to do to achieve such status

Multi Academy Trusts are increasing. At 1 June this year, there were 7,369 open academies in England with a further 1,158 schools in the pipeline. Representing those 7,369 open academies are 2,681 Trusts - confirming that Multi Academy Trusts (MATs) are at the forefront. In fact, 78% of academies are now in a MAT structure, leaving only 22% ploughing a lone furrow as a Single Academy Trust (SAT).

Sixty-six per cent of secondary schools and 28% of primary schools are now academies. In January 2017 there were 5,905 open academies. That's a further 1,464 academy schools in less than 18 months.

Whether schools are jumping in or being pushed, 'academisation' is marching on.

However, the majority of MATs are still at the lower end with 29% overseeing just two schools; 43% responsible for three to five schools - and a further 19% governing between six and ten schools. Only nine per cent currently operate more than ten schools.

The cost and effort of establishing effective MAT structures must demand more scaling up than is currently evident if schools are to properly benefit from the desired shared resources and economies of scale. This is arguably the single biggest challenge - the quest to improve the

quality of education despite ever-tighter funding. The MAT model has a huge opportunity to deliver this - by pooling resources to improve standards whilst also reducing unit costs.

There is more MAT growth to come but growth for its own sake is dangerous. Trusts need to be satisfied their growth will drive school improvement and better outcomes for their pupils. Expansion should be handled with care. It is important to ensure the fundamentals are in place to ensure safe growth. Strategic vision, governance, leadership and people, financial sustainability and risk management are the main pillars of the MAT model and all should be in a strong condition for a MAT to scale up.

Governance and finance are two critical areas.

The starting point should be a full understanding of the different layers of governance and the respective roles and responsibilities of the Trust's members, trustees, committees and/or local governing advisory boards (LGABs). Transparency and accountability is paramount. MATs must have the correct blueprint before they grow; otherwise as operations are scaled up, they will not be able to keep close enough watch on the use of the funds entrusted to them.

A Trust that does not take this seriously will attract criticism from

stakeholders and the Regulator.

Ultimately, it will face having its funding agreement withdrawn by the DfE.

The Trust board's composition must ensure a broad range of skills and a business-minded approach. Trusts must ensure they have a published scheme of delegation together with clear terms of reference for their committees and LGABs.

Robust, standardised efficient processes will enable effective review and appropriate action. MAT Boards need to work with their CEO on strategic thinking and decision making whilst also holding the executive team to account challenging where necessary.

The board must also be held to account by the Trust's members, who have the power to appoint and remove the trustees. Understanding and implementing the right structure is fundamental. Having the right people and the right skills in the right roles with a full understanding of their purpose is essential. Yet this is often a challenge for growing MATs, who might be reliant on a small pool of volunteers and struggle with overlap between the different layers of governance.

Regular assessment, training and development of MAT Boards are crucial and periodic external reviews recommended.



Next, there is finance. Regular and reliable financial information is needed so performance can be reviewed, correct decisions made and appropriate action taken. MATs looking to expand must make sure they have systems in place that give them the capacity to handle growth.

Accounting software is important. A single platform across the Trust is best but not always possible immediately. Often, management reporting relies on cumbersome spreadsheets that effective software can overcome. New schools joining will need integrating into the MAT's financial systems. Charts of accounts and coding structures need to be aligned to enable consistent reporting and reliable comparison.

A MAT's management accounts should report information by school and on a consolidated basis to allow finance officers and finance committees to review the schools within the Trust as separate business units and monitor performance – against budget and against each other – to promptly identify areas of concern.

MAT central services should also be

reported as a separate cost centre so it is accountable for its own performance. MATs should show the charge they make to their schools (by “top slice” or another mechanism) is bringing economies of scale from centralised procurement, HR, IT, estate management and key contracts such as insurances, catering and maintenance.

The MAT model has the power to ensure financial sustainability. Where possible, MATs should build and maintain an appropriate level of reserves, setting aside funds for development projects, and building resilience to guard against temporary income shortfalls. A Trusts' financial budgeting and three to five year forecasting should be based on all of these principles.

Growth itself brings risk. Before taking on a new school robust due diligence is required. Trusts should make a full assessment of the assets and liabilities they may absorb. Risk assessment registers should be updated as the MAT grows.

A strong finance/audit committee will

provide assurance to the board and the CEO/accounting officer. Internal and external audit should report to trustees, members and management on the adequacy and operational effectiveness of the financial systems.

With the foundations for safe growth in place, what is the optimum size for a MAT? There is no set rule here. The DfE suggests the minimum sufficient mass is 2,000+ pupils for mixed or secondary phase. At this size, the organisation should be able to absorb cost pressures on central overheads, drive value for money and be financially sustainable.

Other factors come into play. What works well for a five-school MAT in suburbia may not translate well to a two-school primary and secondary trust in remote parts.

I suspect the rush to consolidate will continue followed by a settling down in the sector as MATs realise their own optimum level. Beyond that, collaboration rather than amalgamation is more likely.

What's on our bookshelf?

The **Institute for Teaching** is a specialist graduate school for teachers. We have a single purpose – to help teachers to keep getting better.

We're dedicated to developing evidence-based practice, and our team are always exploring the best education research and thinking. Here are a few book recommendations for edu-nerds from Peps Mccrea, Katy Patten, and Harry Fletcher-Wood.

Peak: Secrets from the New Science of Expertise – Anders Ericsson & Robert Pool

Peak is a grand tour of Ericsson's decade-long research into expertise across performance professions – definitely worth a read!

Creating the Schools Our Children Need: why what we're doing now won't help much (and what we can do instead) – Dylan William

There's no blueprint for creating great schools, but this book explores the research on how to improve the odds of success. William covers everything from curriculum to CPD, as well as how we can evaluate new schemes.

The Power of Moments – Chip & Dan Heath

This book clearly summarises the evidence on how to make experiences feel powerful, memorable & worthwhile – these are all aims for our Fellows programme.

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Peter Myers
Director - Poole High School

A WELL-INFORMED ESTATE STRATEGY

David Smith, CEO explains how Bellrock is streamlining operations and harnessing technology for academy schools



Q. Tell us a bit about Bellrock's experience in the education sector?

A. We have been working with the education sector for over 11 years. Our experience ranges from advising academies on their estates management strategy, to helping them sell off redundant land in order to generate capital for improvement projects and managing the day to day compliance and budget management for facilities. We currently manage over 60 schools across the UK, including PFI projects, some of which have transitioned to academy status, as well as single academies and multi-academy trusts (MATs).

We have made several acquisitions over the last couple of years, including a long established multi-disciplined chartered surveying business that specialises in the education sector and a software business, Concerto, a property, facilities and asset management platform. These two

acquisitions have extended our portfolio of clients in the education sector and the services we are able to offer to our clients.

Q. How has Bellrock been supporting academy schools?

A. Academy schools have particularly interesting challenges when it comes to estate management. They have often inherited buildings that have to be updated to meet the compliance and regulatory requirements for health and safety and end customer expectations for education standards and results. This along with the need to adapt to an evolving market be that in terms of demographic or changing curriculum, means extra funding, as well as ensuring that budget is assigned directly to achieving educational results.

Bellrock has developed a simple estate strategy review cycle. This includes assessing the existing physical condition and space utilisation and overlaying that with the projected changes that will require new service specification requirements. Some of these changes may deliver better efficiencies particularly for energy consumption. For example, changing lighting to LEDs may be an initial capital cost that is paid back in energy savings. All this information can be captured on the Concerto platform and becomes the data that informs an estate plan, highlighting the priorities for changes along with the budget and funding options. This is a unique way of capturing all of the data relating to the

property and facilities and ensuring it is used to make well-informed decisions about the operation of the estate.

Q. What are the benefits of an estate strategy?

A. The estates strategy plays a crucial role in contributing to the overall ambitions of any strategic plan and objectives. The estates strategy will build on what has been achieved so far by the Executive Team, helping them to gain more control and improved value for the investments made to the estate portfolio. Any on-going rationalisation or enhancement can contribute, as a result, to the overall financial and educational performance of the MAT or academy.

The following example demonstrates how having an estates strategy can help prepare for change. Our surveying team provided strategic advice to two undersubscribed secondary schools that were constructed in the 1960s. Our team proposed that the schools could be merged into a modern purpose-built facility on part of one of the school's sites. The new school has, amongst other facilities, a fully equipped gymnasium and an all-weather play and sports area. The project was fully funded by the development of a multi-storey residential development on the vacant land, facilitated by our surveying team. Although this is a particular case it does illustrate the opportunities that exist to transform a school environment with a carefully constructed estates strategy and releasing spare capacity for redevelopment.



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Q. You have mentioned the acquisitions that Bellrock has made recently, what is your plan for the future?

A. We have always been a technology-enabled business, but in 2016 Bellrock Group made a significant acquisition so our clients can use their workplace as a lever for efficiency and productivity gains. This was the addition of the powerful software engine Concerto. During the past 18 months we have added five new companies from around the UK to the Group, enabling us to broaden our portfolio of advisory and delivery services in the property and technical sectors. We are still looking to bolster our areas of expertise and will have some further acquisitions to announce in the near future.

We have made the strategic decision to migrate all of these companies into the Bellrock brand. We have created three specialist divisions workplace and compliance, technical and real estate, and maintenance and engineering all underpinned by the Concerto technology. This cohesive approach will give all of our clients a unified and seamless experience for advisory and operational services to manage their estate. Our aim is to enhance their opportunity to realise the ambition of their estate whether they purchase the licence for the Concerto software as a stand-alone product to support their estate, or a single service such as real estate management or a total facilities management package.

Q. What was the motivation for acquiring the technology company Concerto in 2016?

A. Concerto is a unique and powerful platform for managing different aspects to the estate. It generates not only workflows, but also powerful management reporting data. This enables customers to review not only single assets such as the building fabric or boilers or lighting for example but how these might impact on other aspects of managing the estate.

Although we had our own in-house technology platforms we saw the opportunity that this connectivity between the facilities management activity, asset and estate management, and project management could present as a real market differentiator. To coin a phrase ‘we liked it so much we bought the company’.

USE ICT TO IMPROVE PARENT ENGAGEMENT

Studies have shown that parent engagement has a significant, positive impact on a child's learning, even after all the other factors that shape attainment, have been taken out of the equation.

Therefore, it's important to identify effective interventions in supporting parent involvement, particularly with those parents who are either not significantly involved in their child's learning, or not involved at all.

However, taking an ad-hoc approach to parent engagement will prove fruitless. To be successful, schools need to develop and adopt a school-wide strategy with a clear goal of improving children's learning.

Barriers to engagement

Work or family commitments are common reasons for a lack of involvement. In our fast-paced, time-poor society, making access to information and being able to respond to it as easily and conveniently as possible, is key.

Harness the power of technology

93% of adults own a smartphone and spend more time on it than with their partner (Source: O2/Samsung 'Digital Life' 2013). Exploiting this trend to improve your school's parent engagement is the obvious route to take, especially since Ofsted's focus is on building good relationships with parents through good

communication and updating them on the progress of their child.

Moving to a paperless method of communication means you can ensure information not only reaches home, but happens instantly.

Schoolcomms is the market leading parent engagement solution, offering a sophisticated, but easy to use system that is powerful enough to handle all your parent interactions. Their Branded Parent App forms the intrinsic link between school and home, keeping parents fully connected so their child can take advantage of their learning day.

As the UK's best parent app provider, they deliver everything you need to keep costs down and encourage hard to reach parents to become involved. Covering everything from attendance, homework, achievement, behaviour and reports, to day-to-day communication between school and home.

The app creates a school community that all parents can be part of. As it fully integrates with the data you're already recording in SIMS, there's no additional administration, keeping everything streamlined and accurate.

Staff buy-in

Staff will require training and coaching on parent engagement through continued professional development and will also need to be fully on-board with their school's strategy. Equally as important, is giving them the tools to help them

implement that strategy in a user friendly and efficient way. Staff are already pushed for time, but by giving them technology that integrates with SIMS, it negates duplication of data and helps automate what otherwise, is a time-consuming process. Schoolcomms offers full online training for staff and access to a comprehensive support system which includes online tutorials as well as a friendly team on the end of the phone to guide staff through any questions they may have.

Parent buy-in

Schools should be aiming to empower parents by being proactive rather than reactive. By giving clear, specific information to parents in a convenient way, via a parent app, you'll bring their child's life at school to the palm of their hand.

Parents are more likely to participate if they perceive a direct positive impact on their own child as a result of their involvement. So, by sharing things like attendance stats, achievements and progress reports in a way that fits in with the complex needs of parents' lives, it empowers them and engages them at the same time.

Flexible functionality

Improving parent engagement is a challenge that all schools face. Schoolcomms' Branded Parent App provides schools with the essentials

and allows you to build in additional functionality when you need it, further enriching the parent experience. Making information easy to share and access, means parents will use it and by using it, they're engaging.

If you choose to add in the full communication functionality you'll get a whole host of benefits including being able to manage unauthorised absences with parents via the app and being able to write their responses back to SIMS.

You can create a safer, cashless environment by introducing online payments and collect money for everything from school meals and uniform to trips and clubs.

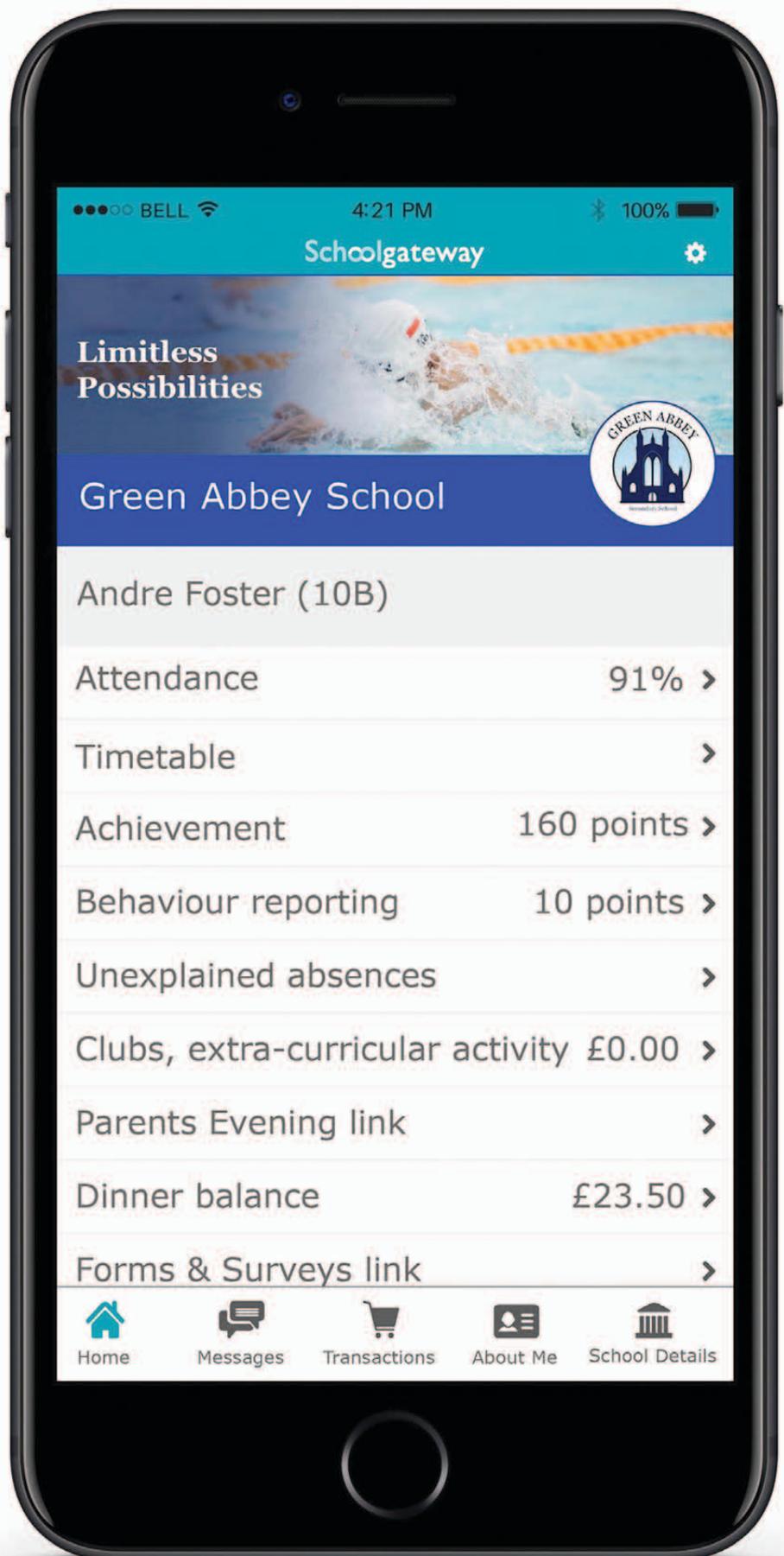
Schoolcomms also offer comprehensive clubs, dinners and parents evening management – all accessible by parents via the app. With the ability to link to your own website, calendar, forms, surveys or news and events, the app is truly the one place parents need for everything they want to know about their child's life at school.

Join the communication revolution

Extending your school's branding to the app reinforces the reputation and community you've worked hard to create. By uploading your banner image, logo and school colours you can uniquely identify your school and continue your branding throughout all your communications. Schoolcomms gives schools complete control, so you can change as often as you want – great if you want to use the banner image to promote an event or parents evening.

So, whether it's messages letting parents know there's homework or a test coming up, sharing reports so parents can monitor progress or simply sending a newsletter, Schoolcomms continues to lead the way as the most powerful parent engagement system and Parent App.

Thousands of schools and millions of parents have already joined the communication revolution and are seeing the benefits of better parent engagement. If you'd like to find out more visit Schoolcomms.com or call 0333 332 7147.



HELPING TEACHERS WITH SAVINGS AND MORTGAGES

Teachers Building Society was founded by teachers in 1966 to help teachers and other education professionals onto the property ladder. Today, the Society still works hard to achieve this aim and to provide a range of savings accounts that meet the needs of teachers in England and Wales.

If you are a teacher looking to save for a deposit, Teachers Building Society currently offers a wide range of competitive accounts, including a Home Saver which offers a competitive rate of interest and a £500 cashback incentive if

you take out a mortgage with them (terms and conditions apply).

The Society also provides a range of different savings options for teachers – including an Education ISA and a Union Home Saver account (for NEU members only).

Bev Jesse, Member Services Manager at Teachers Building Society, said: “We are committed to providing products that serve the needs of the teaching community. By investing in one of our accounts, savers will not only benefit from an attractive interest rate, but will

be directly helping other teachers to own their own homes.”

As well as personal savings accounts, Teachers Building Society has a range of savings products for schools, associations and charities in the education sector, including a 35-day notice account, a 90-day notice account and an easy access account.

Helping teachers get onto the property ladder

The Society has been working with teachers for 50 years and is proud to have



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Richard Willsher, a newly-qualified teacher (NQT) now settled in Dorset, discusses how he found his dream home:

“It was my first teaching job and my first home, so a lot of ‘firsts’ for me at the time! I had a job offer from the school but I hadn’t done a day’s work there. I didn’t think it was possible to own a property at this point in my career and assumed that I’d have to spend at least a year renting whilst I got settled. However, Teachers understood that as an NQT, I would progress up a pay scale, and they offered me a mortgage a month before I started work.

“I didn’t have to supply reams of paperwork or previous pay slips, and this just made the whole process so straightforward.”

Hear what Sarah has to say:

Sarah-Jane, a teacher from Dorset, explains why she picked Teachers Building Society for her savings:

“It was easy to go through everything in my own time as all the details are laid out really clearly on the website.”

“Everything seemed really quick and efficient, and everyone I spoke to was so helpful,” she explains. “If I’m asked how the Society could improve its service, I can honestly say that nothing springs to mind.”

a wealth of knowledge on teacher pay scales, working contracts and mortgage needs.

Supporting teachers – People not numbers

Teachers Building Society can often help when others cannot; each customer is treated as an individual - never a number, and the Society assesses each mortgage application individually using its understanding of the working hours, pay system and employment contracts of teachers.

Because the Society has such extensive knowledge of teacher contracts, it can lend to Newly Qualified Teachers up to two months before they start their first teaching post – even though they are working on a temporary contract. This means that teachers can move into their new home before they start their first job – helping them to settle into a new area before the start of the new academic year.

This same approach is also taken with teachers working on a supply or a fixed term basis – when large banks say no, the Society could say yes to a mortgage

because it understands these types of contracts and only requires 2 academic terms’ employment history in the area the teacher wishes to purchase.

The Society can also lend to teachers in or approaching retirement, because it understands that in today’s society many people are still looking to move home, or re-mortgage in a later stage of their life to help loved ones onto the property ladder.

Couple this individual approach with the ability to provide mortgages to teachers with just a 5% deposit and lending up to five times your annual salary (subject to affordability), and Teachers Building Society are in a great position to help teachers purchase a property.

Affordable Housing Schemes – Highly Commended!

The Society also has a long history of supporting the Government’s affordable home ownership schemes, such as Help to Buy and Shared Ownership. In 2018 it was proud to be Highly Commended in the What Mortgage Award for Best Shared Ownership Mortgage Lender.

How else is Teachers Building Society

making a difference to teachers?

- The Society offers one expert advisor to guide you through the mortgage process at a time to suit you*
- The Society considers new or increased salary if you have secured a new teaching role
- The Society provides all members with a wide range of benefits, including fee-free mortgage deals and prize draws

Lines are open Monday to Friday 9am until 6pm. We are happy to accommodate appointments outside of these times on request and subject to availability. Your home may be repossessed if you do not keep up repayments on your mortgage. Teachers Building Society are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Register no. 156580).



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