

Services to Schools – May 23 update



Each school pays a 6% topslice each year from income (except grants that derive from individual pupils' needs – eg SEND, PPG). Local authority schools have an 8% topslice.

There is an **additional £50 000 School Improvement budget** that supports schools in addressing Trust-wide priorities.

In 22/23 the SI budget supported the following: Additional hours in EY to support new Reception intake (autumn term); Training for staff in phonics; ELSA training; Inclusion project – trust schools working with peer primaries on writing, attendance, SEMH provision and parental engagement; External QA; Leadership Development Programme; Release of DSLs for peer reviews.

Individual schools can also bid for school-specific needs.

What schools get from the levy

There are two tiers of support – Tier 1 is universal and 'free', and Tier 2 is additional to schools on a cost basis.

Tier 1		
SERVICE AREA	ACTIVITY	SCHOOL OR TRUST?
Annual external audit and internal audit	Appoint auditors, keep and collate all schools financial documents, support audit. Production of annual accounts and Trustees' annual report	Trust
Premises and other insurances	Joint procurement across all schools as far as possible. Tender processes. Individual school contracts	Trust
Governance support	Governance Professional Team oversees: training network and events run by Trust; clerking at Board level (Clerk appointed by LAB agreed by trust board, paid for by Trust); subscription to NGA for all in governance positions; purchase of NGA Learning Link; GovernorHub subscription and its admin/maintenance; support for annual governance evaluation; support for governor/trustee panels and liaison with OCC on appeals. Headteacher report format and consistent LAB priority trackers.	Trust
	Maintenance of GIAS, Company House statutory information and updates	Trust
	Trust Governance network and regular training publications	Trust
Pensions	End of year certificates, collation of information; upload to TPS/LGPS/Nest and liaison with auditors. Support for individual employees	Trust
	Support for application for early retirement/ill health retirement	Trust
Finance and Payroll	Pay for systems, processing all financial transactions, monthly management accounts to schools, oversee payroll and in-month changes; pensions liaison	Trust
	Monitoring and authorisation of monthly payroll	Trust
	Completion and submission of financial returns to ESFA	Trust
	Support budget setting by HTs with COO	Trust

	Set and monitor financial policies to ensure compliance with Trust Financial Handbook	Trust
	Oversee and monitor budgets on a monthly basis, once set and agreed; monitor income, expenditure, cashflow; bring back into line from variances; maintain register of business interests	Trust
HR	Policy development and implementation	Trust
	Joint appointments across schools	Trust
	TUPE and liaison with staff/companies on joining the Trust	Trust
	Policy implementation	School
	HR advice for complex or higher level HR situations/casework	Trust
	New contracts/variations letters	Trust
	Informal HR discussions, absence logging, monitoring and recording	School
	Personnel file management	School, Trust for central team
	Recruitment 'wrap' consistent across all schools for vacancies	Trust
	Adverts, JDs, person spec, application packs	School&Trust
	Provision of Staff Handbook and Induction Programme	School&Trust
	Delivery of Induction	School&Trust
	H&S induction for Heads	Trust
	Probationary reviews	School
	Approval for post if new/change to staffing structure	Trust
	Placing adverts; receipt of applications, Shortlisting and process	Trust School
	Long and short-listing, interview process and conditional offer NB involve CEO for DHT and HT positions	School
Follow recruitment checklist (Trust template)	School	
CEO support	Regular meetings with HT. Chairs of LABs as required	Trust
Risk management	Maintain and update risk register, with School input	Trust
	Commission audits against major risks, implement actions to mitigate, monitor and report to Trust board routinely	Trust
	Purchase external DPO services and advice	Trust
Safeguarding	Convene trust-wide group (DSLs, school Safeguarding governors and trustee, CEO)	Trust
	Annual policy review and production Trust policy based on OCC	Trust
	External supervision for DSLs	Trust
	Collation of LA s175 audits – identify trends and strengths/weaknesses	Trust
	Maintain trust-wide SCR administrator's network for consistency and quality of processes/recording and support	Trust
	Commission annual internal reviews; biennial external reviews	Trust
School improvement	Regular meetings of Heads' Group – education director, HTs, CEO by invite	Trust
	Identification of distinct SI budget across trust schools (£50K)	Trust
	Trust-wide training events	Trust
	Annual external QA of school's self-evaluation	Trust
	SIP visits - to suit School calendar/priorities	Trust
	Additional targeted school support as required	Trust
	Annual performance and risk review of each school to HT and LAB in September	Trust
	Annual schedule of schools' quality assurance calendar	Trust
	Additional regular/occasional Trust capacity, at cost	School
Education Director and/or CEO time	Trust	

Preparation for Ofsted and other external reviews	Support for annual and interim reviews through CEO, Director of Education External commissioned support if required.	Trust
Headteacher appraisal	Support to schools x2 per year	Trust
School census, UIFSM and other DfE/ESFA returns	Monitor legal compliance/support through audit etc	Trust&LAB
Premises management	Trust-wide policy and handbook annually Condition surveys; annual audits and checks. Site team management	Trust School
Premises bids	Commission of bid preparation to ESFA, other external funding sources (CIF/PSDS/ etc).	Trust School
Tier 2		
H&S	Trust-wide policy and handbook annually	Trust
	Annual subscription and consistent use of SmartLog for training and recording of documentation	Trust
	Oversight of statutory checks and tests	Trust
Catering	Single contract across the Trust – monitored by COO	Trust
Cleaning	Single contract across the Trust – monitored by COO	Trust
IT	School budget identified for managed service annually including capital sum.	Trust
	Single contract across the Trust – monitored by COO	
From the Scheme of Delegation		
Health and Safety	As required in support for schools	Trust
Liaison DfE/ESFA/local authority	As needed	Trust
Contracts	Joint procurement and individual as needed	Trust
SEND	Approve and publish the annual SEN Report	School
Safeguarding	Appoint nominated governor and DSL	School
Admissions	Propose changes to admissions policy	Trust
Website	Annual schedule of policies and model policies available	Trust
	Ensure DfE publication scheme is met on-going basis	School
Policies	Statutory policies and website publication scheme updated regularly. Trust requires only statutory policies. Schools implement policy framework	Trust&School
Complaints	Follow Trust procedure. Liaise with CEO if formal. Joint resolution where needed	School&Trust
Significant Changes	CEO to action with RD and DFE	Trust

