

**SOUTHWARK DIOCESAN BOARD OF EDUCATION
MULTI-ACADEMY TRUST**
Developing Church of England Education



Key Guidance Joining our MAT

(Key Guidance for Schools Considering Joining Our Trust)

WHAT IS AN ACADEMY?

An academy is a state school that is run by an academy Trust and not the Local Authority. The academy Trust is a charitable body, which enters into an agreement with the Secretary of State for Education that sets out its responsibilities and accountabilities for the effective running of the academy. The academy is funded directly by the Government not through the Local Authority.

WHAT IS A MULTI-ACADEMY TRUST?

A Multi-Academy Trust (MAT) is where a number of schools join together and form a single Trust with a Board of Trustees answerable to the Trust's Members. Members of the Trust are a group of independent people who are responsible for the strategic oversight of all Academies within the Trust. They are the conscience of the Trust, ensuring that the objectives are upheld and monitor the effectiveness of the individual Academies, manage central services and report to the Secretary of State. They work to ensure that individual Academies are performing to the best of their ability and that they get the support and challenge that they require. The MAT will have a Board of Directors which will include individuals from some of their member Academies. The Trust will delegate many powers to a local governing body (LGB) which will have a role similar to that of the current School governing body. These powers are agreed by both the school and the Trust. The LGB will consist of the same governors as we have now.

WHY CHURCH SCHOOLS ARE JOINING MATS

Mission and Ethos

- ✓ Diocesan MATs and their schools share the same mission: to nurture the whole child through encouraging them all to flourish as children of God - spiritually, morally, socially, culturally as well as academically.
- ✓ Headteachers and governors trust their Diocese, already feel part of the Diocesan family and wish to extend this relationship by joining its MAT as a way of securing and strengthening the Christian ethos of their school.
- ✓ Diocesan Boards of Education have a distinguished record of supporting Church schools over many years because of their creditable and respected Officers and Advisers.
- ✓ In these uncertain times Diocesan MATs offer schools a strong sense of stability and continuity.

Collaboration Opportunities

- ✓ Leaders and other staff can share thinking and planning with like-minded colleagues to spread expertise and tackle challenges together.
- ✓ Shared professional development can more easily be arranged, whether led by staff from one of the MAT schools or an outside body.
- ✓ Members of Local Governing Bodies can come together to share strategic thinking, combine skills and support each other during challenging times.
- ✓ Leaders and other staff who have a common purpose can be shared across more than one school, enabling schools to find creative solutions to recruitment challenges, retain staff by providing new opportunities within the group and plan succession more effectively.

Pupil Outcomes

- ✓ Evidence shows that the strong collaboration with shared accountability offered by MAT membership leads to better academic and other key outcomes for pupils and help schools meet the ever-rising external expectations.

Economies of Scale

- ✓ MAT schools find it easier to recruit, share, fund and deploy specialist expertise (for example: data analysis, finance, health and safety) and provide richer curricular and extra-curricular activities.
- ✓ The economies of scale and collective purchasing made possible within larger groups help schools cope better with shrinking budgets.

THE SOUTHWARK DIOCESAN BOARD OF EDUCATION MULTI-ACADEMY TRUST (SDBE MAT)

OUR VISION & MISSION

Vision

Our vision is to establish a culture and context in which schools can grow and flourish and provide an excellent education with Christian values at its heart. We will seek to enable all children and young people in our schools to realise their God-given potential, aspire to exceed their expectations and to build a Christ-centred community.

Mission



To be a high performing Diocesan Multi-Academy Trust which promotes excellence, inclusion and diversity.



In partnership with the Southwark Diocesan Board of Education, to lead schools rooted in Christian values.



To enable a strong collaborative approach between schools which enriches and develops best practice and celebrates success.



To enable the mission of God through the work of the Diocesan Multi-Academy Trust.



To provide exemplary service to its schools in partnership with the Southwark Diocesan Board of Education.

THE SDBE MAT - BUILDING ON THE SUCCESSFUL AND VALUED WORK OF THE SOUTHWARK DIOCESAN BOARD OF EDUCATION

The Southwark Diocesan Board of Education (SDBE) has a distinguished record of supporting its schools over many years owing to its creditable and respected Officers and Advisers. Schools that join the SDBE MAT will continue to have access to these educationalists in addition to their own dedicated MAT staff.

Below are some examples of the work of the SDBE personnel:

Guidance and Support

As a small highly professional team we pride ourselves on our level of 'customer service'. We provide swift and highly professional responses to headteachers and governors seeking advice and ensure that we afford our schools the time and dedication they deserve as a member of the Diocesan family. We work in a 'relational' way. Our staff members are well known and respected as professional individuals by our schools. Recent school surveys evidence the effectiveness of our team and the work they do.

In addition, we are proud of the high quality guidance and support documents we produce for Headteachers and governors covering a wide range of topics, supplemented by our extensive training courses. A comprehensive modular programme is available for full governing bodies, and we hold sessions for new headteachers on a rolling basis. Our materials are regularly updated to reflect changes in legislation and related matters. We also send out regular briefing sheets to ensure headteachers and governors are kept abreast of developments in the ever-changing educational world, and are able to advise them on statutory processes (e.g. expansion of age-range or entering into hard federations).

School Improvement

The SDBE run a huge selection of training programmes, regularly delivered and designed to suit all tiers of leadership within schools. The feedback given regularly commends the content, relevance and delivery of those sessions. As an example, we run a programme of training for heads, deputies and chairs of governors from schools graded Requires Improvement by OFSTED. This programme utilises the individual skills experience and talents of SDBE members in order to work with this targeted audience of delegates to bring about the improvement required in their schools. The programme sits comfortably within our ethos and encourages schools to reflect, set targets, be ambitious, and hence secure a Good or Outstanding outcome at the next inspection. The results of this programme have been impressive. We believe passionately in the development of our staff and the sharing of knowledge and experience and use this as the foundation for our School Improvement agenda.

Partnerships

The SDBE recognises the strength of working in partnership to support individual schools. We have brokered several partnerships over the last few years. Each partnership has been unique and has focussed on the individual needs of the school on its journey of development. We ensure that all partnerships are time limited with clearly defined outcomes and goals as well as having robust monitoring arrangements in place.

Religious Education

The SDBE is at the forefront of Curriculum Development in RE; we have specialist staff who lead on this area. Recently they worked alongside subject coordinators to devise a new Diocesan Syllabus for Religious Education, which is exemplary. The scheme was trialled in several schools ahead of the launch and in turn has received positive feedback. Standards of RE in SDBE schools are high and this revised syllabus will raise standards still further. A particular consideration when developing the syllabus was to ensure that it would meet the needs of non-specialist teachers in what is such a vital aspect of a Church school's provision.

Collaboration

Increasingly, the SDBE is facilitating schools working collaboratively with each other based on local clusters. Over the last two years we have seen greater activity among these local hubs focusing on schools improvement, for example working in triads to triangulate evidence, joint training, and teaching and learning reviews. This work has been highly effective and offers a level of professional support set within our ethos.

Intervention

Occasionally the SDBE has to intervene when a school is underperforming. Officers and Advisers pride themselves on the way these difficult situations are managed within a Christian context. We have seen the impact of removing a governing body and replacing it with an Interim Executive Board (IEB). Members of the IEB were chosen for their expertise as well as to their commitment for preserving and enhancing the Christian character of the school. A new governing body was formed at the school just prior to OFSTED Inspection that judged the school to be good with outstanding features. The SDBE has also located suitable individuals to conduct governance reviews.

Succession Planning

Developing leadership at all levels plays a significant part of our work. As well as structured training programmes we offer coaching, professional dialogue and sometimes opportunities for secondments to gain experience. Our recruitment data demonstrates that we 'grow our own' highly effective leaders. We recognise the challenge of leadership and ensure that those new to post are supported and sustained. We 'talent spot' potential leaders at a very early stage in their career. Many of our leaders state openly that they only wish to work in one of our SDBE schools. Several of our retired Headteachers become governors in our schools. There is a real commitment amongst our leaders to the Diocesan family of schools and all that we aspire to achieve.

Admissions

The SDBE provides guidance and support for its schools on admissions and appeals, working with governing bodies on developing and improving the clarity of their admission arrangements in line with the requirements of the School Admissions Code. Officers respond to school consultations and provide training for governors and Headteachers on reviewing their arrangements. Officers also assist schools where there has been an objection to the Schools' Adjudicator, seeking legal advice where necessary and ensuring schools are supported through the sometimes complex adjudication process.

People & Human Resources

Because of their expertise and experience, SDBE staff are very well placed to advise on the full range of personnel issues that arise within schools. Recent cases have involved supporting Headteachers and governors on such staffing matters as capability, disciplinary, grievance and redundancy.

Buildings

The SDBE has worked closely with governing bodies and partners to expand popular and successful schools to meet the growing population of the Diocese. Our buildings officer ensures that any expansion improves provision and is managed in such a way to maximise assets as well as not disrupt the journey of school improvement during a building programme. We have secured specific expansions to support long-term structural arrangements, for example, increasing pupil levels to ensure no mixed age range classes.

THE SDBE MAT

Why we formed a Multi-Academy Trust

The greater majority of our schools are currently in a very strong position but the educational landscape is changing rapidly and our concern is that some of our schools may become isolated. The expectation and encouragement of the Government is that all schools will become academies, work together and support one another. In addition, Local Authority support is also diminishing along with the scope to apply for additional funding to enhance the educational experience of the students.

We believe that by forming a Trust and offering the opportunity for our schools to join, we can continue to build on the success of the Southwark Diocesan Board of Education, create greater security, provide stability, offer more services and develop greater relations and knowledge-sharing not just within regions but across the Diocese, ultimately improving the educational experience for our children.

The SDBE MAT Board and Executive Team have a very clear understanding of how we want the Trust to operate, specifically our clear and joint commitment to the protection of our schools autonomy. We do also acknowledge the need for us, as an organisation, to remain compliant with the relevant bodies that govern us and the need for a degree of standardisation in order for us both to fulfil our roles. We have worked hard to develop a Scheme of Delegation (a legal document that defines the relationship and responsibilities between the Trust and our Academies) that recognises the need for compliance carefully balanced with the protection of autonomy.

Advantages of joining our MAT

- * Protection of the school's ethos and inclusive philosophy by maintaining control of our own identity
- * Better opportunities to share best practice and professional development across all phases
- * Control of our own curriculum, continuity of education and opportunities for all children
- * Further strengthening of transition between phases
- * Programmes across the schools, adding real value to the education of all children
- * Increased opportunities for children to work with other local schools, broadening their social horizons
- * Recruitment of staff – better opportunities to work across all schools
- * Greater access to partnerships and links
- * More opportunities for staff retention, deployment and promotion, by keeping good staff within the Trust who might otherwise further their career elsewhere
- * A good, strong base for developing leadership
- * Increased economies of scale and efficiencies in the running of central services such as finance (purchasing and resourcing), HR, and premises
- * Greater freedom on how best to utilise your allocated budget

What will stay the same?

- * Distinctive Christian character and identity
- * Ethos, aims and values
- * School name, logos and uniform
- * Parental, community and staff representation on the local governing body e.g. Parish, Deanery
- * Foundation governors remain in the majority
- * Curriculum
- * OFSTED & SIAMS Inspections
- * Educational Partnership and collaboration with other schools
- * Arrangements relating to Special Educational Needs
- * Pupil admission criteria
- * Free School Meals
- * Staff Pay and Conditions.
- * Commitment to the community

The decision on whether to join the SDBE MAT will be taken by the Governing Body and Headteacher based on what is considered best for your school, children, staff and wider community. As part of the decision-making process, the governing body will always undertake a full consultation with their stakeholders and will take their views into account before any final decision is made.

FREQUENTLY ASKED QUESTIONS

JOINING THE SDBE MAT

Q: Who determines whether a school applies to become an academy and join the SDBE MAT?

A: The governing body. In the case of a maintained school the formal resolution to convert to an academy must be recorded in the minutes of a full meeting of the governing body.

Q: Is there a requirement to consult?

A: Yes. While there is no requirement to consult regarding the intention to apply to become an academy, once the DfE grants the academy order there is a requirement to hold a statutory consultation exercise. When a school registers an interest in becoming an academy with the DfE, governors are advised to hold informal discussions with key stakeholders.

Q: Is consent required from the SDBE MAT?

A: Yes. Once the school's application has been received the SDBE MAT will carry out a due diligence exercise and decide whether to give its written consent for the school to join the SDBE MAT.

Q: Is approval required from Southwark Diocesan Board of Education?

A: Yes. It is a requirement that any Diocesan school wishing to become an academy, either as a stand-alone academy or part of the SDBE MAT, must have the written approval of the Board.

Q: Is the decision reversible?

A: No. Once a school converts to academy status there is currently no route to return to voluntary aided or foundation status. Both sides should be committed to making the partnership work. If there were serious issues, we would try to resolve matters with your school and the DfE. We all want what is best for the children in your school.

Q: We don't want to miss the boat, but neither do we want to be the first to join the SDBE MAT – how do we decide?

A: Each school needs to decide whether it is in its best interests to join the SDBE MAT in discussion with the SDBE. Governors should consider where they are on their journey, ask whether SDBE MAT membership will assist them in achieving their vision, take their time to listen to their key stakeholders, and give consideration to such matters as performance, finance, staffing and, buildings and land.

Q: My local community schools are interested in joining the SDBE MAT – is this possible?

A: At present our focus must be on our Diocesan Church of England (C of E) schools. It may be possible for other schools to join in the future.

Q: My school is currently in a hard federation, how will this work in a Diocesan SDBE MAT?

A: Academies cannot technically form federations, but there is no reason why a "federated" structure cannot be accommodated in the SDBE MAT. The Local Governing Body (LGB) would govern all schools in the current federation and existing staffing structures would be retained.

Q: We work closely with our local schools. Can we continue to do so within a Diocesan MAT?

A: Absolutely. This is a fundamental aspect of our MAT's philosophy. It will be important to maintain existing links with pyramid schools and families of schools. Our aim is for local hubs to develop within the Diocesan MAT so that local schools support and strengthen each other. Good and Outstanding members of school staff will be encouraged to share their expertise across both these local hubs and more widely across the MAT.

Q: Can we decide to be a stand-alone academy?

A: Yes, this is still currently an option for schools. The SDBE has a process by which schools can apply to the Board for approval to convert to stand-alone academy status.

Q: Can my school leave the SDBE MAT if it is not happy with the service provided?

A: We would hope that both the school and the SDBE MAT are committed to making the partnership work. The SDBE MAT would aim to resolve any difficulties in the best interests of the children in your school. The complaints procedure for the SDBE's current Partnership Agreement would continue to exist for those services provided by the Board and a similar complaints procedure will be developed by the SDBE MAT.

There is mention in the White Paper published in March (WP2016) that parents might be able to petition the Regional Schools Commissioner (RSC) to move the school to a different Diocesan MAT where the school or SDBE MAT is underperforming. A church school could only move to a non-church MAT in exceptional circumstances and the Christian ethos must be protected.

Q: Could the Secretary of State remove our school from the SDBE MAT at any time?

A: If a school in the SDBE MAT underperforms, e.g. goes into an OFSTED category, the RSC has power to move that school to another MAT if he or she feels the SDBE MAT does not have the capacity to improve the school. The RSC may also exercise this power over a coasting school that does not have an effective action plan. These are the only circumstances in which the RSC has such power. The SDBE will be consulted about a suitable sponsor to protect the Christian ethos such as moving to another Diocesan MAT.

Q: Can we form our own MAT with other local church schools?

A: The SDBE has debated school-based MATs and determined that this is not a model for the Diocese of Southwark as it does not believe this to be in the interests of the Diocesan family of schools. The rationale is that school-based MATs tend to be based around personalities who may move on, that lines of accountability are not always clear and that one school may try to impose its own "stamp" on others.

Q: What would be the timescale and process for conversion?

A: The DfE estimates that it usually takes between 4-5 months for a school to convert to an academy. Conversion can take place at any time during the year from the 1st of a month. Should your school decide to join our MAT, we would work closely with your school through the conversion process, providing project management support to make the conversion process as seamless as possible for your school.

Q: If we convert will we lose our individuality?

A: We recognise that schools have their own unique identity, and we want to celebrate this. We see this as a key benefit of being part of our MAT. There is currently no expectation that your school's uniform, name or its distinctiveness would be altered as a result of your school's conversion, other than losing the term Voluntary Aided (VA) or Controlled.

SDBE MAT STRUCTURE

Q: How will the Diocesan SDBE MAT be structured?

A: As with other MATs there will three levels of governance: Members, Directors and Local Governing Bodies (LGBs). The Members of the SDBE MAT company have the strategic oversight and are responsible for reporting annually to the DfE on the performance of the Trust, holding the directors to account for the performance of the SDBE MAT. They appoint the Directors.

The Directors have responsibility for the overall management of the Company and hold the master Funding Agreement with the Secretary of State. They will oversee the delegation of responsibilities to the LGBs of each academy and hold the LGBs to account, manage compliance and monitor performance of the Academies in the SDBE MAT. The LGB is likely to mirror the current VA model and will have delegated powers from the Directors (see below).

Q: Who is the MAT accountable to?

A: The MAT is accountable to the Secretary of State. As a company limited by guarantee, the MAT must prepare and file an independently audited annual report and accounts with Companies House.

Q: Who are the members of the SDBE MAT?

A: The SDBE MAT comprises three members: The SDBE, represented by the Diocesan Director; The Bishop of Southwark's nominee, The Bishop of Croydon; and the Diocesan Board of Finance, represented by the Diocesan Secretary.

Q: Who are the Directors?

A: There are ten Directors: two members of the SDBE (one of whom is the Chair); an Archdeacon; the Assistant Diocesan Director of Education; a Chair of Governors; two Headteachers of Outstanding schools (one primary, one secondary); a National Leader of Governance; a key educationalist; a finance expert; a legal/commercial/property expert and the CEO.

Q: How will the SDBE MAT be run?

A: The SDBE MAT is a charitable company limited by guarantee. It is responsible for the performance of the academies within the SDBE MAT and ensuring that statutory responsibilities are met. It holds the land and other assets of the academies in Trust, but does not take ownership of the land and assets.

Q: Will the school's governing body remain the same when it joins the SDBE MAT?

A: Each school within the SDBE MAT will have a LGB. The SDBE intends that these will mirror the VA model as closely as possible and, therefore, that those currently on the governing body will remain. Technically, however, the SDBE MAT appoints all governors including those traditionally appointed by PCCs, Deaneries, etc. In practice the SDBE MAT would seek nominations from these bodies. Local incumbents would, as now, be ex officio governors and current links with local parishes/deaneries would be retained. Staff and parent governors would continue to be elected by their constituencies.

Q: Will the LGB have powers?

A: LGBs will have delegated responsibility for the governance of their school under a Scheme of Delegation. We envisage that good or outstanding schools will see a minimal change in governance and will have delegated responsibility for appointing senior staff, admissions, finance, buildings, etc. The SDBE MAT would technically have the right of veto over all decisions, but is likely to exercise such rights only in extreme circumstances.

Q: Will there be more than one SDBE MAT as more schools join?

A: The SDBE will consider whether there should be regional hubs as the SDBE MAT grows. It may in future decide that the SDBE MAT should be split into smaller units, but the current intention with the information available is that there will be only one SDBE MAT. This will enable consistency of process and accountability across the Diocesan family of schools.

CHURCH OF ENGLAND ETHOS

Q: Will a church school retain its religious character on becoming an academy?

A: Yes. The religious character remains the same for an academy and cannot be changed through the process of acquiring academy status. The academy would be deemed to be an independent school with a religious character. The SDBE MAT will ensure that the school's Christian ethos is protected. The SDBE will insist on certain safeguards in its Funding Agreement with the Secretary of State and any supplemental agreements for each academy in relation to RE and collective worship, appointment of the Headteacher, etc.

Q: Will our school ethos change as a result of joining the SDBE MAT?

A: No. Each church school will retain its individual ethos and unique identity as part of the diverse Diocesan church family. The SDBE is determined that the Diocesan family of schools stays together and it is committed to continuing and enhancing its support for and development of the church school family. Acadamisation is a process to a different status and different way of working, but it must do nothing to

diminish the C of E foundation of our schools. The SDBE will do all in its power to secure the Christian ethos of our schools for future generations of children.

Q: Will the SDBE MAT operate within the same Christian ethos as the SDBE?

A: Yes. The SDBE MAT has a vision and mission statement aligning it to the SDBE, which was adopted on 7 July 2016.

THE ROLE OF THE SOUTHWARK BOARD OF EDUCATION

Q: Will the SDBE continue to exist if all schools become academies?

A: Diocesan Boards of Education are legal entities under the Diocesan Measure which is a parliamentary measure agreed by the Diocesan Synod and Parliament. The Measure requires every C of E Diocese to have a Diocesan Board of Education. The Diocesan MAT, although a separate entity, could not exist without the SDBE, which is the DfE-approved sponsor of the SDBE MAT. The SDBE MAT will, therefore, follow Board policy and buy the services of the Board through purchasing the Partnership Agreement for all schools in the SDBE MAT. These services will, as now, be focused largely on key aspects relating to supporting and developing the Christian ethos of our schools.

Q: What will be the relationship between the SDBE MAT Board and the SDBE?

A: The SDBE has developed a structure that makes the Diocesan Director of Education (DDE) the Chief Executive Officer (CEO) of the SDBE MAT with a Chief Operating Officer (COO) undertaking the day-to-day running of the SDBE MAT. The COO reports to the DDE/CEO. The SDBE MAT officers will be required to operate under key values and principles set by the SDBE.

Q: Will current SDBE staff transfer to the SDBE MAT?

A: No. It is intended that the current staffing structure of the SDBE will remain and team members will continue to advise C of E schools and academies in the Diocese. The SDBE MAT will buy in these services for the academies in the SDBE MAT. The SDBE MAT will employ its own staff to supply additional services to the academies and carry out its legal duties.

STAFFING

Q: Will the role of the Headteacher remain the same?

A: Yes. It is anticipated that the Headteacher's role will remain the same. Each school will retain a Headteacher unless there is a need to consider a different model for an individual school or schools on the retirement, or resignation, of a Headteacher.

Q: Will staff be able to work in other schools within the MAT? Will they have to?

A: Staff will have the opportunity to work in other schools within the MAT. We believe this will be a great opportunity for staff development.

Q: Will staff still be employed by our school or will staff contracts be with the MAT if our school converts and becomes a MAT academy?

A: Yes. Staff will transfer to the SDBE MAT under TUPE as the SDBE MAT will become the employer of all staff. While it is likely that the LGB will be given delegated powers to appoint most staff, the SDBE MAT will appoint the selection panel for senior staff appointments and will be represented on these panels.

Q: Will there be a change in the salary scales our school employees are currently on?

A: Staff will transfer on no less favourable terms and conditions. Any necessary amendments in the future would only be following consultation with staff and unions.

Q: Who decides the pay and conditions for each school?

A: As discussed above, your school staff would transfer to the MAT on no less favourable terms and conditions and any necessary amendments in the future would only be following consultation with staff and unions. The SDBE MAT can set its own pay and conditions, but members of staff who transfer do so under their existing terms and conditions. The SDBE MAT has no plans to vary from the current national pay and conditions. Any changes would have to be consulted upon with staff and unions. Of course, we all recognise that things can change in any school (academy or not) over time.

Q: What will be the process for staff progression and performance management? Will there be other opportunities?

A: There will be a range of opportunities for staff training and staff progression, and we see this as a major advantage of schools joining the MAT. The MAT will be responsible for the performance management of Headteachers, and will work closely with governors.

Q: What is the situation regarding teacher and support staff pensions once our school becomes an academy?

A: Teachers working in an academy fall within the scope of the Teachers' Pension Scheme (TPS), just as if they were employed in a Local Authority maintained school. Staff transferring from a maintained predecessor would simply continue their membership of the Scheme. As the employer, the MAT would be responsible for remitting contributions to the TPS and for all other administrative responsibilities that fall to employers who employ teachers who are subject to the teachers' pensions' regulations.

The MAT will also ensure that the Local Government Pension Scheme (LGPS) arrangements stay in place for non-teaching staff. As part of the conversion process, the LGPS scheme's administrators will undertake an actuarial assessment to determine how much the MAT will need to contribute and the terms of that contribution. This may be higher than at present. In short, your school's staff will not see any impact on their pensions because of the conversion to academy status. The MAT's funding agreement requires it to ensure that all staff employed by it have access to the TPS or the LGPS (as applicable).

Q: What about continuous service?

A: All previous service will count as continuous service when a member of staff transfers to the MAT.

Q: Is there still a need for a bursar in each school?

A: Individual staffing models will be specific for each school and led by need. It is envisaged that the MAT will be supporting, as opposed to replacing, the many and varied responsibilities of a school bursar. The shape and design of schools staffing structures will continue to be the joint responsibility of the Headteacher and LGB.

FUNDING & FINANCE

Q: How are academies funded?

A: Academies receive the same level of funding as maintained schools. The Education Funding Agency (EFA) calculates funding using a Local Authority (LA) formula for mainstream provision or place-led funding for high needs institutions. Most funding for academies comes from the General Annual Grant (GAG). Capital and pupil premium allocations are paid outside the GAG. The financial year for academies runs from 1st September to 31st August.

Q: How will the MAT be funded?

A: The MAT holds the funding agreement with the DfE and decides how much money to delegate to schools and how much to retain. Typically MATs retain between 5% and 8%. We plan to retain 5% of a school's budget in order to provide cost-effective back-office services and schools will decide on their own spending priorities. This payment is called the Support Costs Contribution (SCC). The SCC will fund a core, cost-effective service providing the following:

- (a) Financial statutory duties and support;
- (b) Core human resources;
- (c) Core building and land support;
- (d) Emergency support;
- (e) Quality assurance for standards and school effectiveness.

The 5% SCC will not be used to fund insurances, premiums, licences, or other similar costs as these represent an unavoidable expense that the school already incurs in order to operate and/or remain compliant.

Q: Could this percentage be increased by the MAT?

A: Yes, in theory. This would only happen if there were an unavoidable increase in the cost of providing services to MAT Schools. We do not foresee or anticipate this happening, but if there were a need, schools would be consulted on any proposed increase, would receive good notice of any increase, and would have the opportunity to build it into their budget. Under LA control, there remains the same risk.

Q: Will we receive any additional resources in terms of money or support?

A: The additional support will come from MAT central staff. The MAT has also been granted a Sponsor Capacity Grant from the DfE, and the Diocese has also committed to fund the initial MAT set-up work. These are extra resources for the benefit of the whole MAT and will not be devolved individually to schools.

Q: How much say do individual schools have in their own budgets?

A: Individual schools will still set their own budgets with assistance from the MAT. Budgets will need to be signed off by the school's local governing body, and then the MAT Board, prior to formal submission to the EFA.

Q: Our school is running with a surplus budget. Will the MAT take this money from us?

A: Your surplus budget remains with the school to save or spend as they see fit (within a loose framework of due diligence guidelines that will ensure transparency and probity).

Q: Can a school with a deficit budget convert?

A: No. A school with any size deficit would need to have a recovery plan in place and agreed by the DfE before they would allow its conversion.

Q: What about the conversion grant?

A: The £25,000 conversion grant is made payable to the MAT. This will be mainly spent on the legal costs surrounding conversion as well as other costs associated with conversion into the MAT.

Q: What about the money which the LA currently retains?

A: Most of the schools' block of the Dedicated Schools Grant (DSG) is delegated to schools through the funding formula, but some is de-delegated from schools to the LA for functions such as Trade Union cover, behaviour support, and the landlord's part of property maintenance, as agreed by Schools Forum. This de-delegated sum is available to academies, which become responsible for providing those services themselves.

Q: What about LA services?

A: Schools can continue to purchase services from other providers, however, as part of being within the MAT, we will be offering a great number of those services which will be funded from the Support Cost Contribution (SCC) that all converting schools will pay annually (the 5% charge detailed above). Some services – such as school transport, oversight of the provision of school places, co-ordination of admissions at age 5 and Fair Access Protocols – are retained as a statutory responsibility by the LA.

Q: How will SEN funding work?

A: Special needs remains the responsibility of the Local Authority so the LA is obliged to deliver the same levels of support to academies as they do to the maintained schools. This includes access to high tariff needs funding as well as access to specialist provision via the same systems and procedures that maintained schools are subject to.

Q: For those services we have to pay for separately, will we have to use suppliers recommended by the MAT, or will our school be able to buy in services from elsewhere if they chose?

A: The MAT academies will be free to choose their own suppliers for services outside of the MAT's core responsibilities, but will be expected to follow the MAT's financial regulations on purchasing (i.e. like for like quotes above a specified value etc). The MAT will be able to broker relationships on behalf of its academies that offer reduced costs and a single point of contact. As the Trust develops, we will collectively consider whether there are any areas where jointly procured services might be beneficial to the MAT and its academies both financially and in terms of quality of service.

CHANGES WITHIN MY SCHOOL

Q: Will all the schools in the MAT have the same policies?

A: As a Trust and as the employer of all staff within our member academies there are some policies that we have to proscribe in order to remain compliant with our various regulatory bodies. Consistency and proscription of certain key policies will ensure we remain a fair, equitable and consistent employer across all schools and we remain compliant as a group. Where possible, we have safeguarded the local academies ability to develop and set their own policies to reflect their unique local context and character. These include curriculum policies, safeguarding, SEN, etc. We will aim to utilise the best practice from all member schools in revising both statutory and non-statutory policies and consulting on their wording before implementation across the MAT. The SDBE MAT will also provide model policies that schools can adapt to suit their own local circumstances. The emphasis will be on assisting schools and reducing burdens.

Q: Will an academy in the SDBE MAT retain control of admissions?

A: Yes. While technically the SDBE MAT becomes the admissions authority, the LGBs will have delegated responsibility from the SDBE MAT to determine the admission arrangements that must conform to the DfE Admissions Code & Appeals Code. LGBs will still be required to consult the SDBE and have regard to the SDBE guidance on admissions. LAs will retain responsibility for co-ordinating admissions so the LGB's responsibilities for determining applications and returning ranked lists to the LA will remain as now.

Q: How would admission arrangements change once our school becomes an academy within the MAT?

A: There is a proposal in the WP2016 for all appeals to be handled by local authorities. In the absence of such arrangements, the *status quo* would continue. Schools in the SDBE MAT will still need to prepare a Statement of Case in advance of the appeal and field a Presenting Officer (governor or senior member of staff) for the appeal itself. The SDBE has template Statements of Case that schools can use.

Q: Will we still have OFSTED and SIAMS inspections?

A: Yes, OFSTED is responsible for monitoring academies and SIAMS inspections will continue for Church schools.

Q: What will be the process should our school's results drop, or an OFSTED report identify areas for improvement?

A: As the SDBE MAT is responsible for standards, it will regularly monitor the performance of schools in the SDBE MAT and intervene as necessary (e.g. if pupils are not making required progress). The SDBE MAT would support the school's action plan and broker external support if required. It would also be responsible for ensuring that areas for development in an OFSTED or SIAMS report are followed up. We would also expect schools to notify the SDBE MAT of any issues.

Q: Are there benefits of conversion in terms of educational outcomes?

A: Evidence suggests that schools working together in formal partnerships leads to improved standards. Joining the MAT will give you increased opportunity to collaborate with other academies within our MAT. Secondary academies have shown an improvement already with GCSE results increasing an average of 11.5 percentage points – double the national average – on 5 A*-C grades.

Q: Will there be greater flexibility in the curriculum?

A: Yes. Academies do not have to teach the national curriculum. However, all academies must teach a broad and balanced curriculum which includes RE. For pupils below Key Stage 1, academies are required to follow the Early Years Foundation Stage (EYFS). The SDBE MAT Board will determine how much flexibility there is to depart from the national curriculum and, as such, schools will be expected to put a case to the SDBE MAT if they wish to exploit this flexibility. It is anticipated that the SDBE MAT will wish to support creative, exciting curricular approaches.

Q: Does the LA still have responsibilities for academies within the MAT?

A: Yes, the LA still has responsibility for the following:

- home to school transport, including transport for pupils with special educational needs (SEN)
- education psychology, SEN statements and assessment
- assigning SEN resources for pupils who require high levels of additional resource (this is a top-up to formula funding under a separate contract with the LA)
- monitoring of SEN provision and parent partnerships
- prosecuting parents for non-attendance
- provision of pupil referral units for a pupil no longer registered at an academy.

Q: How does capital funding work?

A: Capital works at MAT schools are funded by a combination of DFC (as in a maintained school) and funding streams from the DfE. DFC will be automatically calculated based on pupil numbers for each year. The MAT will manage bids for Capital and the allocation of funding across the schools. Capital funds will be held and administered by the MAT, just as the SDBE currently holds DFC for VA schools, but spending decisions will be taken at a local level. Schools will no longer have access to the Locally Co-ordinated Voluntary Aided Programme (LCVAP), nor will they have to meet the 10% liability towards capital costs that currently applies. The MAT can apply to the Education Funding Agency (EFA) for specific capital projects – as can individual schools. All this comes within the terms of the Funding Agreement.

Q: What would happen to the ownership of our school land and buildings if our school converted to an academy?

A: Church of England school site ownership is often complex and typically involves Trustees holding parts of the site and the Local Authority owning others. In the case of each school a report on title would be commissioned by the MAT to establish existing arrangements. For Church schools, the land and buildings remain with the site Trustees, usually the SDBE. The playing fields are typically held by the Local Authority and a long lease (125 years) based on the DfE model lease would be granted by the Local Authority to the MAT.