

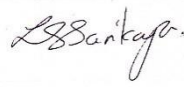


**THE ST. BART'S  
ACADEMY**  
— TRUST —

**Central Fund  
Charging Policy**

**March 2022**

## The St. Bart's Academy Trust Central Fund Charging Policy

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<b>Approved by Trust Board:</b>		<b>Lisa Sarikaya</b> Chief Executive Officer
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Date	Section Amended	Signature



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## 1. The Central Fund

A central fund is maintained for the purpose of running the central function of the St Bart's Multi-Academy Trust and also to provide a range of services and support for the schools within the Trust necessary to operate effectively and efficiently.

The benefits of working as a multi-academy trust are well documented in terms of sharing expertise, economies of scale and shared services. Membership of St Bart's Multi Academy Trust will give academies in our family access to a range of support and services, to enable school leaders to primarily focus on providing high standards of education for the children in our Trust.

In order to achieve this the charge to academies joining the St Bart's Multi-Academy Trust in total is **6.75%** of the academy GAG funding only. Specifically the pupil premium, early years, high needs and any other directed specific funding will not be included within the central fund calculation. The top slice includes an element of recharges which previously would have been recharged on top of the original top slice. The rationale for this change is that it streamlines the process and means there are no additional recharges added. It also includes a **0.5%** Capital charge to enable the statutory and reactive maintenance to be carried out across the estate.

This creates a number of benefits for the Trust including but not limited to the following:

- School improvement
- Curriculum development, data and professional development.
- Governance
- Financial Services and packages
- Payroll and pension administration
- HR services
- Facilities and Estates management
- ICT support (additional charge)
- Health and Safety
- Compliance and data protection support and advice

SBMAT provide a comprehensive support service, enabling our schools to focus on delivering the best education possible to their students.

The central contribution will be reviewed periodically to ensure that it continues to meet the needs of each individual school.

## 2. School Improvement

- Progress review meetings with the Chief Executive Officer and Deputy Chief Executive Officer
- Regular school visits and support from School Improvement to quality assure judgements and offer support to address priorities
- Access to School Improvement team for support, advice, and CPD opportunities
- Access to our team of Specialist Leaders in Education (SLEs) and other outstanding teachers and leaders.
- Teaching & learning development and support
- Access to a vast range of training courses
- Professional learning networks for subject/phase leaders and teachers
- Leadership development programme and pathways
- New principal induction
- Access to the DSL and SENCO network groups
- Peer and external reviews
- Annual Pupil Premium review or health check on request
- Quality Assurance of SEF and SDP

- Annual Standards Review with MAT support plan as required
- Annual MAT wide training day
- Support with OFSTED inspections
- Staff secondment and career progression opportunities
- Various opportunities via School Direct:
  - Involvement with the recruitment of trainee teachers
- Access to a wide pool of talented trainee teachers to have on placement in the school or recruit as ECTs
- High quality external support
- Access to our School Improvement Strategy –

## 2.1. Diagnosis

- Internal, Peer and external reviews (OFSTED, SIAMS, PP etc.)
- Quality Assurance of self-evaluation
- Data analysis
- National comparisons
- Impact of the curriculum
- Pastoral support
- The quality of behaviours for learning
- Attendance data

## 2.2. Interventions:

- Trust wide formative and summative assessment procedures
- Trust wide moderation leading to agreed standards across all aspects of teaching and learning
- High Quality teaching
- Specific intervention strategies for particular schools
- Specific intervention strategies for a group of schools
- Intervention strategies across all Trust schools
- Improve culture and attitudes for learning and behaviour

## 2.3. Delivery for improvement

- Leadership development
- Coaching
- Talent management
- Staff deployment
- Learning Networks
- Subject Networks
- Year Group Networks
- Action Research
- Peer to peer support

## 3. People

- Full access to our HR Service with unlimited advice and support with HR matters
- Full access to our HR Administrator
- Facilitation of advertisements through local and national providers – Via My New Term
- Advice on performance management, capability and staffing
- Advice on changes and updates to employment law and any new government initiatives
- Processing of all contractual appointments, terminations and variations
- A complete set of policies / procedures
- Production of contracts for employees within the trust

- Guidance and support with any recruitment needs
- Support to schools in relation to employment
- Union consultation
- Complex casework and investigation support
- Restructuring – guidance and support with process and procedures
- Training - we will work with you to provide training on HR related subjects, dependent on need
- School support with payroll, starters, leavers and absence management including liaising with payroll services to resolve any issues and queries around employee pay.
- Support and regular advice on budgets in relation to HR
- Production of payroll
- All legal returns and submissions for employees within the trust
- Absence management and guidance
- Occupational health provision covering referrals and reviews

### 3.1. What is not included?

- Advice on pensions (although signposting to LGPS and Teachers Pensions will be provided)
- Recruitment of staff to the academy – advice can be provided to support this
- Disclosure and Barring Service (DBS) checking - this is facilitated through a third party

## 4. Finance

- Centralisation of the finance function including processing of all invoices, Bacs payments and overall management of the central finance system.
- Access to advice, guidance and support from the finance team
- Advice on compliance with the Academy Financial Handbook and the MAT's financial procedures
- Support, guidance and review visits through business support manager roles
- Statutory ESFA returns completed on your behalf which include:
  - Budget return
  - Land and Buildings returns
  - Annual accounts return
  - VAT returns
  - BACS payments
  - Month end and year end procedures
- External audit co-ordination, agreement of audit plan and production of MAT Financial Statements and Annual Report
- Internal audit – management of service and costs
- VAT returns, completion and liaison with HMRC
- Preparation of monthly management accounts for trust board reporting
- Bank co-ordination and set up which include:
  - Local academy bank account (for receipt local income)
  - Purchasing cards
  - Management of Direct debits (as appropriate)
- Administration of Finance System and Budgeting systems
- Administration and co-ordination of Payroll service
- MIS co-ordination of transfer of licence on conversion to Academy status
- Production of Trust-wide finance regulations and procedures which reflect requirements included in the Academies Handbook circulated annually by the ESFA
- Design and responsibility for the financial scheme of delegation
- ESFA funding co-ordination and processing
- Co-ordination and regular processing of supplier payments via our purchase ledger
- Financial reports, includes annual performance review and regular financial overview report
- Budget setting guidance and support

- Analysis of financial risk linked to risk register
- Oversight of Insurance guidance and co-ordination
- Capital asset register
- Termly finance staff meetings to provide opportunities for training and networking
- Drafting and submission of the annual budget
- Half Termly budget reviews
- Training and support of any future financial procedures and updates

## 5. Procurement and organisation of the mandatory services

### 5.1. Contract Services

- Access to contacts and procurement support to create a clear picture of current procurement practices and provide advice on opportunities:
- Creation of a strategy for each commodity (books, printing, etc.) to establish bulk buy savings and quality improvements for each key area of spend
- Access to a single high quality contract supplier for key services across the MAT
- Tender and quotation management for contracts shared with other schools
- Service level agreements and regular meetings with key suppliers to continuously improve quality and drive down costs
- Access to procurement savings via the MAT group agreements
- Central register of leases and contracts
- Contract negotiation and contract procurement

### 5.2. Mandatory Services

- All audit fees and charges-e.g. statutory financial audits, teacher pension audits, internal audits (both financial and non-financial etc.)
- All payroll charges
- All charges associated with the LGPS pension scheme administration (including the valuation costs and charges)
- All bank fees and processing costs
- All HR costs
- All training costs, software and license fees associated with operating the financial management and budget management system
- Costs associated with any additional external financial support

Procurement of low value or occasional items remains the responsibility of individual schools

## 6. Governance

- The oversight of the main Trust Board, who take the legal and statutory responsibility for the Trust and its academies
- Support and guidance through the conversion process
- Negotiation in respect of the agreement of the Scheme of Delegation
- HR support for issues related to staff performance and other matters
- Leadership of the Principal's appraisal process
- On-going Academy Improvement support for the school (see separate guidance)
- Access to the Trust's in-house governance and administration colleagues
- Regular Chairs' meetings with the Chair of the Trust Board
- Access to Trust email addresses, SharePoint and website
- Annual Trust-wide information and training events
- Use of the Trust's agreed policy framework
- Meeting schedule, agenda, templates and minute templates

- Access to local training and development opportunities (Flick

## 7. Safeguarding

- The support of the Trust Designated Safeguarding Lead
- MAT safeguarding policy and strategy
- Audit and review documentation and analysis of practice
- An annual training and networking programme
- Supervision opportunities for DSL/DDSL
- Advice and guidance on academy's single central register, providing updates where necessary
- Single point of contact for advice and guidance where necessary
- Support in dealing with allegations against staff
- Access to SBMAT model policies, procedures and guidance
- Guidance on accessing mandatory training for both academy staff and governors
- Access to online awareness training for governors
- Annual safeguarding audit
- Central collation and analysis of safeguarding data
- Support for SCR and safeguarding administration

## 8. Estates and Facilities

### 8.1. Initial start-up on joining

- Information, advice and support during transition to academy and initial compliance audit

### 8.2. Estates

- On-site and by phone support
- 5-year property/condition funding strategy
- Capital Maintenance and improvement plan for each site supported by SCA allocation
- Assistance with ESFA data collection surveys
- Assistance with Emergency Planning
- Property Care Service for all statutory maintenance and reactive repair and maintenance
- Safe minibus use guidance
- Asbestos management plan reviews
- Assistance with Cleaning, Catering & other Estates contract management
- Assistance with recruitment
- Estates monitoring check lists for Site Teams
- Assistance in the event of plant or building failure
- Assistance with major project planning
- Assistance with Budget planning

## 9. Health & Safety

- Access to advice, guidance and support via e-mail and telephone from a qualified health and safety adviser
- A full health and safety audit with a report and action plan and an annual review, monitoring or inspection visit
- Support visit to assist the educational establishments to manage health and safety risks in areas such as risk assessment reviews and any other 'bespoke' support
- Access to health and safety policies, guidance, checklists and model risk assessments



- Support with accident/incident management including processing accident reports, producing statistics, accident investigation and liaison with the Health and Safety Executive where required.
- Access to display screen equipment assessment, including appropriate advice, recommendations and action plan
- Complete guidance and access to all relevant documents on Educational Visits including any approval as required
- Fire safety risk assessments, advice and managing works
- Trust wide risk assessments
- Display Energy and Energy Performance Certificates and advice

### 9.1. What is not included?

- Maintaining property asbestos register, managing asbestos removal and providing emergency advice
- Providing advice on water hygiene (legionella prevention) and managing works
- Radon gas advice and management
- Accessibility audits (DDA) and advice
- Property related corporate compliance advice and management
- Electrical testing and inspection
- Any other engineering maintenance work

## 10. GDPR/Data Protection

- GDPR policy and privacy notice
- Registration with the ICO
- Data protection officer support and audit provision
- Training and support
- Data breach and subject access request guidance
- Privacy notice

## 11. Technology

- ICT helpdesk
- A common platform for email and communication, utilising Office 365
- Website redesign (if required) using the template designed for the Trust
- Access to recognised technicians through our common provider (school pays the annual fee)
- Complete hardware audit and plan for development
- Support with tendering for IT hardware as required
- Working within Trust-wide agreements for maintenance through our provider
- Support with developing a strategic plan and disaster recovery plan for IT - Trust-wide IT Strategy and Disaster Recovery Plan are available
- Engagement with our Apple Regional Training Centre based at Kingsland C.E. Academy
- Cyber Security Support
- Annual website compliance check

### 11.1. What is not included?

- Internet / Broadband access
- Software / Online subscriptions
- Hardware purchases

## 12. Costs procured and organised by the Central Team but paid for by individual schools

- All schools are covered with the RPA and this is deducted at source by the RPA from the monthly GAG allocations. However, each individual school is responsible for paying its own additional insurance policies - e.g. minibus.
- Pension liabilities for individual staff.
- Catering contract
- Cleaning contract
- Legal Services
- School Admission Appeals
- Evolve (EVC)
- Energy





# THE ST. BART'S ACADEMY

— TRUST —

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