



JOINING
HEART
ACADEMIES
TRUST

We value the
dreams and
aspirations
of **everyone** in
our **community**



HEART
ACADEMIES TRUST

HIGH EXPECTATIONS ACHIEVEMENT RESPECT TRUST



CONTENTS

Welcome	3
Who we are	4
Why join Heart Academies Trust.....	5
Governance.....	6
Executive Team.....	7
School Improvement Support	8
Central Support Services	9
Working at Heart Academies Trust.....	13
Thinking of joining us?	14
Frequently Asked Questions.....	15

WELCOME

HEART Academies Trust was established in 2017 to support schools build upon their existing strengths, to improve and maintain high educational standards and to encourage continuity of education within the local community.

Our mission, then and now, is to create a family of academies who are at the heart of their community transforming life chances through excellence in education and providing opportunity for all.

Our overwhelming belief is that every child can be successful, both personally and academically, with early and effective help from staff who know and value them as an individual. We have high expectations of all members of our school community; children, young people and professionals alike are challenged and supported to achieve their very best.

Adopting a 'stronger together' approach and a commitment to positive collaboration enables each academy within the Trust to celebrate what they already do well whilst providing opportunity for continued development and improvement. We believe that head teachers know their community and best understand the needs of the children. Each of our schools have their own identity and each head teacher retains operational leadership of the school.

We are sponsored by The Harpur Trust, one of the largest charities in the UK. For over 450 years the Trust has been inspiring and supporting the people of Bedford using the legacy from their founder Sir William Harpur. Their aims are clear and simple: to improve the lives of local people by providing and promoting education, creating opportunity and breaking down barriers. With a proven track record in education through their ownership and management of four Harpur Trust private schools in Bedford and sponsor of Bedford Academy since its inception in 2010, they are the perfect partner to support HEART Academies Trust as we grow.

We look forward to telling you more about our dreams and aspirations for those within our community and to the opportunity of welcoming you into our Trust.

David Morris
Chief Executive Officer





WHO WE ARE

OUR VISION

Transforming lives.

OUR MISSION

To create a family of academies who are at the heart of their community transforming life chances through excellence in education and providing opportunity for all.

OUR CULTURE

'The way things are done around here.'

- Autonomy of decision making at school level
- Collaboration at all levels
- Doing what is right for the community
- Aspirational
- Transparent
- Continuous learning and development
- Confident
- Resilient
- Reflective and forward thinking

OUR VALUES

High Expectations; Achievement; Respect; Trust

OUR STRATEGIC PRIORITIES 2022 - 2025

- Child Wellbeing
- Staff Wellbeing
- Sustainability
- Engagement and Communication

OUR PRINCIPLES

Ethical Leadership directed by respect for ethical beliefs and values and for the dignity and rights of others.

Inclusion which fosters a feeling of belonging to unlock the potential of our children, staff and communities.

Equity which promotes impartiality, fairness and justice for all to ensure everyone in our community has access to the same opportunities and outcomes.

WHY JOIN HEART ACADEMIES TRUST?

Our priority as a Trust is to work collaboratively with our schools to provide the highest quality of education for all our young learners.

By working in partnership, schools benefit from the sharing of best practice, the ability to support one another in times of challenge and the opportunity to derive inspiration from each other's successes. As one we can achieve so much more.

HEART Academies Trust does not aspire to be a Trust of identical schools. Instead we wish to celebrate individuality and actively encourage each school to embed the ethos it has adopted to meet the specific needs of the community it serves. As a Trust we provide you with the time and resource to focus on the most effective and rewarding way to educate your students.

The Trust has an established central support services team which not only provides guidance and expertise on teaching and learning but takes a lead in the non-educational aspects of running a school, enabling head teachers to focus on delivering outstanding outcomes.

If you choose to join HEART Academies Trust we can promise you:

- A structure where head teachers are freed from the day to day operational challenges of running a school to focus on delivering exceptional teaching and learning outcomes.
- A culture that encourages both teaching and support staff to share expertise and learn from one another.
- A focus on professional development which grows talent from within and develops future leaders.
- High quality governance.
- An environment that prioritises inclusivity and the wellbeing of the children it serves and the staff it employs.
- Financial savings from joint procurement that can be re-focused to benefit our students.
- Risk and operational expertise to support in times of challenge.
- Quality assurance and compliance in all areas within school.
- A focus on listening with honest and frequent engagement.
- Investment in your infrastructure to provide safe, clean, inspiring and well-resourced learning environments.
- A proactive approach to supporting sustainability and climate change that meets the environmental, economic and social needs of the present without compromising the ability to meet the needs of the future.
- A supportive environment that values each individual within its community.



GOVERNANCE

At HEART Academies Trust, we have three tiers of governance:

- Members of the Trust
- The Board of Trustees and their supporting Committees
- Local Advisory Boards

We believe that high quality school governance leads to high quality schools and supports the provision of outstanding education.

Members

The Members are, in essence, the shareholders of the company. This is currently a group of people, appointed by the Sponsor including the Chair of the Board of Trustees. The members have several functions including approving the Trust accounts and appointing Trustees.

Trustees

Trustees have a range of powers and responsibilities that they are legally required to execute to ensure that the schools provide the best possible education for all students. The Board considers the vision and aims of the Trust and its schools, as well as strategy and policy to deliver key objectives. It has ultimate responsibility for budgets, salaries, safeguarding and health and safety across the Trust. In addition to the main Board there are four Trustee sub-committees who consider specific areas:

- Education
- Finance and Operations
- Risk and Audit
- Remuneration

Local Advisory Boards

Each school within the Trust has a Local Advisory Board (LAB) which reports directly to the Board of Trustees. LABs hold a similar status to the committee of a maintained governing body and through our scheme of delegation have certain powers of governance delegated to them, although ultimate responsibility remains with the Trustees.

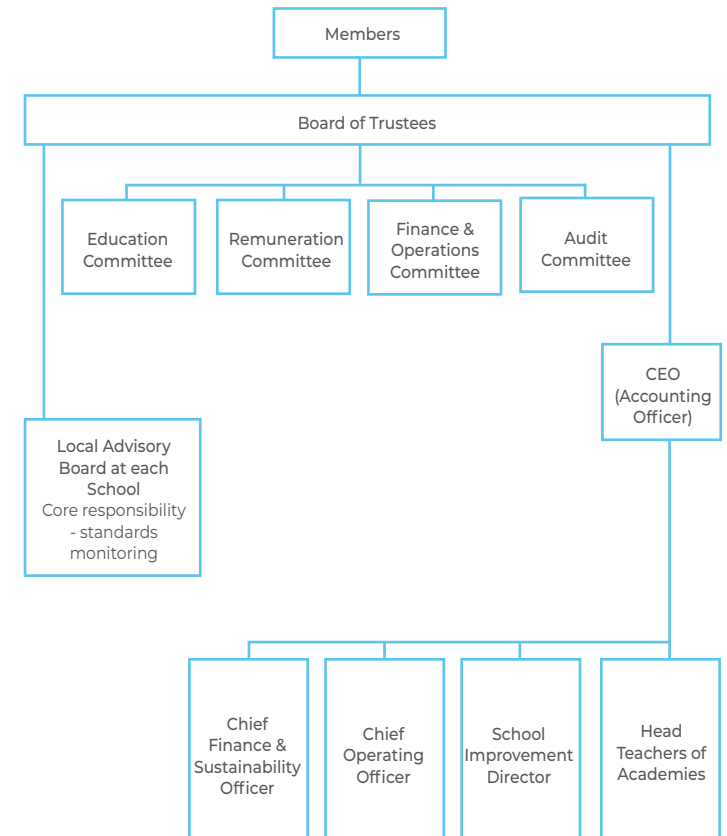


Chair of the Board of Trustees

David Hoare, Chair of Trustees, joined the Trust in January 2019. By background he is a Chemical Engineer, businessman and

entrepreneur. In February 2020 David stood down as Chair of the Teenage Cancer Trust after 10 years. Since 2013 David has focused his time on education and improving educational standards, especially for the disadvantaged. From 2014-2016 he was Chair of Ofsted and has also been a Trustee of the AET Group and the David Ross Educational Trust. David has an unparalleled range of experience in guiding schools across the UK and has a clear vision for taking our Trust forward.

HEART Academies Trust Structure



EXECUTIVE TEAM



David Morris, CEO

David Morris joined the education sector in 2009 after a successful career in the Army serving in Afghanistan, Bosnia and Northern Ireland. Initially David worked within the

Operations team of a Trust before becoming CEO of a Trust in Coventry in 2014. During his leadership the Trust grew from 2 to 15 schools and David oversaw 15 successful OFSTED inspections. During this time David was also asked to support another Trust in Leicester, which he did for two years, steering them through a full Trust OFSTED inspection.

David became CEO of HEART Academies Trust in May 2019. David's role is the strategic lead in the Trust reporting to the Board of Trustees. The role of the CEO within a Multi Academy Trust (MAT) has evolved considerably over the last few years reflecting the reality of the demands involved in overseeing a MAT. From delivering and leading its vision and strategy, to managing people and culture, improving organisational performance, sustainability and building key external and internal relationships, the role is varied and requires the CEO to wear many hats.



Anna Crawte, School Improvement Director

Anna initially joined HEART Academies Trust as the Academy Improvement Advisor for CPD in 2018 and became School Improvement Director

in 2020. She works closely with the leadership teams in all schools within the Trust to ensure the best outcomes for our children.

Anna has worked in schools in Northamptonshire and Bedfordshire, including a 4-19 school, so has both secondary and primary leadership and teaching experience.

Anna is able to support colleagues at various stages of their careers from ITT through to Leadership mentoring. Anna values how staff development is integral to the strategic vision for school improvement and has successfully coached staff at a range of levels to improve teaching and learning as well as leadership skills. This has included developing a Women in Leadership programme supported by the DfE. Anna works closely with all schools to ensure school improvement is an integral part of our Trust Strategic plan. She facilitates improvement work through supportive challenge.

Anna studied French and Spanish at University College London and qualified as an MFL teacher from the University of Southampton. In addition to her Senior Leadership roles, Anna has previously been Head of Year, Head of Faculty and overseen transition. Anna has also completed her NPQH and is currently enrolled in the NPQEL programme.

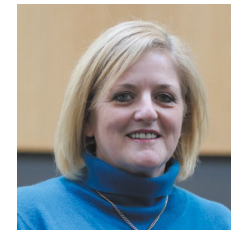


Paul Edmond, Chief Finance & Sustainability Officer

After graduating from university with a degree in Biology Paul moved to London and trained as a chartered accountant.

He qualified in 2003 before moving into the charity sector where he had the fortune of working for a number of incredible organisations - children's charities (Coram, Plan UK); the Wellcome Trust; Community Development Foundation and Wood Green Animals Charity.

Paul joined HEART in 2017 and oversees the work of three functions, Finance, IT and Sustainability. Paul is a Trustee for the Diamond Learning Partnership Trust and a Fellow of the Institute of School Business Leaders. In 2022 Paul accepted the role of co-chair of the UK School Sustainability Network (UKSSN) Operations group, a national network of schools and Trusts working to help support staff navigate a way to a more sustainable future. Paul is also a member of DfE working groups on financial reporting, digital standards and sustainability.



Lisa Archer, Chief Operating Officer

Lisa joined Bedford Academy in 2013 in the role of Director of Operations. Having worked as part of the leadership team that established the Trust

in 2017, she was appointed as Chief Operating Officer and led the centralisation of support services including Estates and Facilities, IT, HR, Marketing and Catering. With the exception of IT she continues to lead these teams in addition to having responsibility within the Trust for Data Protection and Community Lettings.

From a marketing and operational management background, Lisa began her career with British Gas before moving into the healthcare sector where she held senior leadership positions with the BMI Healthcare Group and Guys and St Thomas' NHS Foundation Trust. Before joining Bedford Academy, Lisa was responsible for marketing a portfolio of global executive development programmes at Cranfield University.



SCHOOL IMPROVEMENT SUPPORT

HEART Academies Trust strives to support school improvement at all levels and believes that it is most effective when schools work together. At its best, school improvement brings together a sense of collaboration, constructive challenge and positive change.

HEART Academies Trust adopts a system of aligned autonomy for all our schools. This is outlined in the scheme of delegation. Each school retains the operational leadership of their schools. The school improvement strategy supports this by involving school leaders at each stage in answering the questions:

- What needs to improve?
- What will we do to improve this?
- Who is the best person to lead on this?
- Do we need external support?

When allocating the right person to lead improvement work, our priority is to utilise skills from within the Trust which also supports the continuous professional development (CPD) of existing staff. External support will be deployed when judged to be appropriate. In order to add capacity to schools to release staff to lead school improvement, we have Trust classroom teachers who are trained to teach in all of our schools.

In order to effectively analyse areas requiring improvement, regular meetings take place between school leaders and the School Improvement Director. This allows open and transparent dialogue to ensure improvement work is completed in collaboration with the school. These meetings also allow data to be analysed with the school to ensure improvement work links with high expectations for outcomes.

An education strategy meeting takes place every half term. This allows head teachers and senior leaders to meet regularly to evaluate the current context and educational landscape. These meetings give leaders time to reflect on current practice, share innovation and work collaboratively to design and shape future plans.

We prioritise the development of staff – especially those in the early stages of their teaching career. We work closely with a range of ITT providers to ensure we have exposure to high quality trainees to address any challenges in teacher recruitment. All ECTs are supported by the School Improvement Team to help develop the leaders of tomorrow. There are also clear pathways into teaching to encourage and develop existing support staff.

The School Improvement Team has Ofsted Inspector experience and is able to support schools prepare for an inspection. They are also able to provide practical, hands on support during an inspection from the first notification call through to the final feedback meeting.

The Trust Senior Attendance and Welfare Officer supports all schools with improving attendance so that poor attendance is not a barrier to student success. This support is regular and can also be tailored to the needs of the school.

The School Improvement Team can also facilitate any external or internal reviews of key areas such as Safeguarding and SEND. The CEO and School Improvement Director are DSL trained to provide additional support where appropriate.

CENTRAL SUPPORT SERVICES

Under the direction and leadership of either the CFO or COO, the Finance, Facilities, Catering, HR and IT teams provide centralised support to all schools within the Trust.

By providing unlimited centrally managed support services, HEART Academies Trust takes away the burden from schools of managing day to day operational issues. This support enables head teachers to spend time on teaching and learning and to focus on delivering the outstanding educational outcomes our children deserve.

The Trust focuses on employing skilled and proactive staff for their central support teams who build relationships, take time to get to know each school and to work collaboratively with you to deliver a responsive, dedicated and professional service. We ensure that you are kept fully informed with regular updates and meetings to discuss operational performance, support planning, and ideas for improvements that will further enhance the quality of service delivery.

Catering

Having a fully managed, onsite catering service at each school ensures the Trust has complete control over the quality of food, menu choices and service delivery it provides. In addition to the day to day management of the onsite catering teams, the Head of Catering Services ensures:

Menu Development

- Menu planning gives due regard to customer preference, nutritional standards, quality, variety, choice, portion control, sustainability, special dietary requirements and cost.

Compliance

- Implementation and monitoring of effective and consistently applied procedures guarantee that all legislative requirements are met.

Procurement and Contract Management

- Negotiation of a Trust-wide procurement contract and ongoing engagement with suppliers to ensure the Trust secures best quality, best price and best service for all catering supplies.
- Investment in improving kitchen and dining room environments; 5-year development strategy for upgrade and renewal of equipment

Data protection

The COO is the designated Data Protection Officer for the Trust and as such supports schools in all matters relating to GDPR including:

Data Breach Management

- Leads, investigates and coordinates the response to data breaches, including liaison with the ICO.

Subject Access Management

- Coordinates and manages responses to Subject Access Requests and Freedom of Information Requests..

Compliance

- Conducts regular data audits and assesses third parties who process personal data on our behalf for GDPR compliance.

Training

- Ensures all staff receive mandatory GDPR training on an annual basis.





Estates and Facilities

Under the direction of the Trust COO, Facilities Maintenance Team Leads and Maintenance Assistants are deployed at each site to provide a coordinated approach to planned preventative and reactive maintenance, security services, cleaning management, portage and fleet services. In addition, the central team manages and delivers the follow key services:

Estate Development

- Trust-wide investment in the estate portfolio to ensure continual improvements to the condition of school buildings and learning environments.
- Management of all renovation and expansion projects in terms of funding applications, planning, procuring and delivery.

Compliance

- Robust processes, procedures and testing routines, including internal and external quality assurance audits, to ensure that the Trust properly discharges its H&S duties.
- Management of auditable records for asset maintenance, inspections, complaints, costs and repairs.

Procurement and Contract Management

- Negotiation and monitoring of all service and maintenance contracts to ensure that contractors deliver high quality and cost-efficient services, in line with contract specifications.
- Proactively seeks and supports applications for condition improvement and grant funding.

Community Lettings

- Fully managed service which proactively seeks opportunities for future growth and greater revenue generation

Finance

The central finance team is led by the Trust CFO, an experienced accountant and fellow of the ISBL, and a strong management team to provides a full range of services including:

Budgets and Accounts

- Preparation of the annual budget, in-year and three-year forecasts.
- Monthly finance reports tailored to individual budget holder needs.
- Support with Integrated Curriculum Financial Planning (ICFP).

Purchasing and Sales

- Provision of an online purchasing system to support the ordering of goods and services and the processing of invoices.
- Procurement advice and support when tendering for high-value goods or services.
- Sales invoices and credit control.

Payroll and Pension

- Preparation of each school's monthly payroll with appropriate engagement with head teachers to help ensure payroll is accurate.
- Completion of all statutory payroll and pension returns.

Safeguarding and Compliance

- Measures to ensure full adherence to the Academies Financial Handbook.
- Measures to ensure robust fraud prevention measures are maintained.
- Management of internal and external audits of finance and other support services.
- Management of the Trust central bank accounts and asset register.
- Completion of all ESFA and other financial returns.
- Oversight of school insurance and financial risk management.

- Maintaining all Trust finance policies and procedures.

Human Resources

As an internal resource the HR team is able to provide a personal and responsive service through developing a deep understanding of each school and its staff, fostering relationships and providing tailored support to help address issues quickly and effectively. Areas of expertise provided include:

Recruitment

- Knowledgeable and cost-effective support.

Employee Relations

- Fully supported case management in relation to sickness absence, disciplinary and grievance issues, capability processes and staff restructures and redundancy consultations.
- Collaborative working relationships with Trade Unions.

Staff well-being and Engagement

- Ongoing review and development of initiatives which enhance and promote inclusion, staff well-being, employee engagement and retention.
- Employee Assist Programme
- Occupational Health referrals
- Facilitation of Trust Staff Forum

Contracts of Employment

- Trust-wide terms and conditions of employment that ensure an effective, fair and cost considered compliant framework for employment, now and in the future.
- Administrative support and management of all transactional activity related to HR processes.

Staff Development and CPD

- Knowledgeable Learning and Development support to help influence and drive staff training and development initiatives.

HR Policies and Procedures

- Guidance and support to ensure a consistent approach to employee terms and conditions and employment law compliance.
- Administrative support with HR statutory returns including workforce census, gender pay gap and Trade Union facility time reporting.

ICT

The Trust has a central, in-house, ICT team responsible for supporting all of our schools. All ICT staff are qualified technicians and receive formal ITIL (Information Technology Infrastructure Library). Specific ICT support provided to our schools includes:

Helpdesk

- First-line support facilitated through a web helpdesk for reporting and prioritising requests.
- Second-line technicians with the qualifications and skills necessary to provide both onsite and remote support. The team has experience in resolving the majority of ICT hardware and software issues experienced by school staff.
- Third-line support from a combination of our senior in-house staff and our trusted third-party support teams.

Regular Senior Leader Engagement

- Coordination of the Trust Digital Strategy team, a group of senior leaders and ICT champions from across the Trust that meet to share and collaborate on best practice.
- ICT clinics for staff training and support.

Hardware and Infrastructure Services

- Investment and support to develop and maintain school ICT network, server and broadband infrastructure.
- Administration and support for multiple operating systems (Microsoft, Google, Apple).
- Server backup and recovery services.
- Repair and maintenance of all ICT hardware

Communication Services

- Support for effective delivery of remote or blended teaching and learning.
- Telephone system support.

Administration Services

- Maintaining all Trust ICT policies and procedures and third-party ICT support contracts.
- Procurement of all ICT hardware (following detailed consultation with school senior leaders).



Marketing and Communications

The Trust provides schools with comprehensive communication support including:

Communications

- Developing and managing high quality communication channels including websites, social media platforms, newsletters, prospectuses, adverts and e-shots.

Public & Media Relations

- Networking and engagement programmes to enhance the Trust's profile and relationship with our school communities.
- Handling all media enquiries, including crisis communications, in conjunction with external PR support provider.

Student Recruitment

- Supporting schools with student recruitment marketing initiatives

Brand Custodian

- Ensuring all Trust marketing and communication materials adhere to our visual identity and provide clear and consistent messaging to all stakeholders.

Sustainability

The Trust has a team of climate and sustainability leads with representatives from each of our schools and the central support function. The team is managed by the Chief Finance and Sustainability Officer (CFSO). The Trust also has a 'Green Governance' group to provide support and accountability for climate action. The HEART Climate Action Plan has five key aims

- **Resilience to climate change:** adapting our education buildings and systems to prepare for the effects of climate change.
- **Net zero:** reducing direct and indirect emissions from buildings, driving innovation to meet legislative targets and providing opportunities for children and young people to engage practically in the transition to net zero.
- **Education and Careers:** Excellence in education and skills for a changing world preparing all young people for a world impacted by climate change through learning and practical experience.
- **A better environment** for future generations: enhancing biodiversity, improving air quality and increasing access to, and connection with, nature in and around education and care settings.
- **Influence system change:** engage stakeholders to encourage urgent and impactful rewiring of the education sector.



WORKING AT HEART ACADEMIES TRUST

We want to provide all employees with a rewarding, fulfilling and enjoyable career. We recognise that staff are our most important resource and therefore wish to invest in their future.

Our commitment to staff development and well-being is paramount.

In addition to excellent opportunities for professional development and career progression, we also offer:

- A competitive salary which, for teachers, is aligned to national standard T&Cs.
- Regular training and development programmes tailored to your needs, no matter where you are in your career.
- An exceptional ECT induction programme.
- Secondment and shadowing opportunities within the Trust.
- An open and collaborative working environment, including a Staff Forum.
- A career in an organisation that values individuality and diversity.
- A focus on staff welfare and wellbeing, including a comprehensive Employee Assist Programme.
- Individual laptops for teaching staff.
- An excellent catering provision.
- Free car parking.
- Cycle to Work Scheme.
- Discounted cinema tickets.
- Regular celebration of staff success.
- On-site EV charging points.
- A commitment to environmental sustainability.



THINKING OF JOINING US?

HEART Academies Trust will be pleased to provide guidance and support to any school wishing to join us. This will include:

- Advice and guidance on academisation process with the Department for Education.
- Advice and guidance on the legal process, including access to solicitors and example documentation.
- Advice and guidance on consultation processes including example documentation, timelines and decision making.
- Supporting negotiations with the Local Authority over land transfer and other matters such as the Commercial Transfer Agreement.
- Advice, guidance and support on TUPE and staffing arrangement at point of transfer.

If you are interested in finding out more about becoming part of HEART Academies Trust then please contact our Chief Executive Officer, David Morris; dmorris@heartacademiestrust.co.uk

We look forward to hearing from you.

FREQUENTLY ASKED QUESTIONS

1. What makes HEART Academies Trust unique?

We are a modest-sized Trust which means all our schools have an active part to play in shaping our future. We are large enough, and have the financial resources, to offer a well resourced and skilled central support team, yet small enough that we can build supportive, meaningful relationships among our schools. We have as our sponsor the Harpur Trust who have supported us financially and now work alongside our schools to ensure we have opportunity to transform young lives in Bedford.

2. We are committed to our school values, to what extent will we be able to retain these?

We do not aspire to be a Trust of identical schools. Our overarching Trust values of High Expectation, Achievement, Respect and Trust underpin everything we do. However, we actively encourage each school to develop its own values and ethos to meet the specific needs of the community it serves. There is no requirement on schools joining the Trust to change their name, logo or uniform.

3. Why should a school join HEART Academies Trust?

Our priority as a Trust is to work collaboratively with our schools to provide the highest quality of education for all our young learners. Quality first teaching and learning is at the core of everything we do. By working in partnership, schools' benefit from the sharing of best practice, the ability to support one another in times of challenge and the opportunity to derive inspiration from each other's successes. As one we can achieve so much more.

As a Trust we provide you with the time and resource to focus on the most effective and rewarding way to educate your students. The Trust has an established central support services team which not only provides guidance and expertise on teaching and learning but takes a lead in the non-educational aspects of running a school, enabling head teachers to focus on delivering outstanding outcomes.

4. If we were to join your Trust, what role would the school and its staff play in the Trust?

As a smaller Trust embarking in a period of growth, all our schools have the opportunity to help shape our strategic priorities and plans. We strive to include all head teachers and key staff in these discussions in a purposeful way.

5. If we were to join, how would the Trust structure challenge and support us?

The Trust's School Improvement Director acts as a critical friend, working alongside each school to support and challenge. Time is spent to foster relationships and fully understand the context and community of the school. All work is done in collaboration with the school; it is not a "done to" model. Where possible, current school staff are used to lead improvement, as opposed to bringing in external personnel. This ensures all improvement work is embedded and long lasting.

6. What do you believe we will bring to your Trust?

We believe every school has areas of excellent practice and brings a wealth of knowledge and skills. By a new school joining our Trust, we see this as more talented practitioners being able to share their experience for the benefit of all.

7. Are resources such as teaching and support staff and financial resources shared across the schools in your Trust?

Under the leadership of the Chief Finance & Sustainability Officer and Chief Operating Officer, the Finance, Facilities, Catering, HR and IT teams provide support to all schools within the Trust. We provide unlimited access to centrally managed support services which takes away from schools the burden of managing day to day operational issues. This enables head teachers to spend time on teaching and learning achieving the outstanding educational outcomes our children deserve.

8. What CPD opportunities does your Trust offer staff?

Head teachers know the needs of their school and staff therefore CPD requirements are identified at school level. We have extensive links with external CPD providers. This includes a close relationship with the Harpur Trust who provide opportunities for leadership development for teaching and support staff. We support staff on our internal programmes of development as well as nationally recognised qualifications. We have a high-quality programme for both Initial Teacher Training and Early Career Teachers. Retention of our trainee teachers and ECTs is extremely high. Ongoing support is tailored according to need at each stage of a teacher's career.

FREQUENTLY ASKED QUESTIONS

9. What do you charge schools to be a part of your Trust and how is this applied?

The Trust charges each school 5% of total GAG income on an annual basis. The purpose of the charge is twofold:

- To fund our central support services
- To provide a consistent benchmark to measure financial outcomes between our schools and the wider sector.

Other restricted funds such as Pupil Premium and Sport Premium are fully allocated to the school.

10. Are local finances managed at Trust Board level, or do individual schools retain responsibility?

The Headteacher at each of our schools is responsible for budgets relating to teaching and learning, educational support and the school office/administration. This includes the salary costs of teachers, classroom support staff and office staff; and expenditure relating to specific education grants, for example Pupil Premium, Sport Premium and SEND grant funding. Budgets relating to other support services are overseen by a member of the Trust Executive team. Management accounts are prepared on a monthly basis by the Trust finance team, discussed with head teachers and central budget holders, reviewed by the Executive team and reported to the Trustees. The Finance Committee of the Board of Trustees scrutinises the figures on at least a termly basis.

11. Will Pupil Premium/top up funding money allocated to our school be ringfenced for children in our school?

Yes, all restricted funds such as Pupil Premium and Sport Premium are fully allocated to the school.

12. What is the Trust policy on financial reserves held by a joining school?

The Trust follows accounting rules that state any funds transferred should be treated as 'unrestricted funds'. In practice, this means those reserves are added to the Trust's reserves and are available to benefit all the children in the Trust, including the joining school. Equally, the existing Trust reserves are available for the joining school should investment be required.

13. Who decides on contractors for work within the school and, for those contractors decided centrally, how would the transition with respect to current providers be managed?

Subject to contract terms it is very likely that existing contracts would novate across to the Trust. Contractors that would ordinarily fall with the Trust central team budgets would then be managed by the appropriate central team manager and either the CFO or COO. We would then hold discussions with the joining school as to the longer-term benefit of continuing with the existing contractor or, at the end of the contract, moving to a new supplier. It may be that contractors working with the joining school provide a high-quality service that can be extended to other Trust schools; this would be assessed on a case-by-case basis.

14. Can you identify what financial benefits/savings our school would make by joining?

Working with school leaders we aim over time to generate new income, identify cost savings and add value through a range of measures including:

- Leveraging the skills and experience of the central finance team to manage and negotiate contracts.
- Negotiating the procurement of goods and contract renewals that take account of the size of the Trust rather than the individual school.
- Sharing of resources across schools to the benefit of everyone.
- Developing grant applications for new funding.
- Helping to maximise other funding opportunities, for example in community lettings.

15. How are premises costs managed and prioritised across the Trust?

Premises budgets are managed by the Trust COO. To enable the Trust to prioritise spend, third-party condition surveys of each school are commissioned on a three-year cycle. Specialist mechanical and electrical (M&E) services and health and safety inspections are undertaken regularly. The COO meets with the head teachers of each school at least once every half term to ensure regular communication of day-to-day or emerging issues that require attention. All surveys are used to inform and plan the next 1-3 years cycle of investment and help ensure nothing in the school is a barrier to teaching, learning or wellbeing of staff and students. To provide assurance that facilities and health and safety are being managed effectively and aligned to Good Estates Management for Schools (GEMS), these activities are independently audited on a cyclical basis.



FREQUENTLY ASKED QUESTIONS

16. Will our admissions policy have to change?

No

17. Will we be a feeder school for other schools in the Trust?

There is no requirement for this but can be consulted on in the future

18. How will SEND provision be affected by joining the Trust?

We strive to make SEND provision in all of our schools of the highest standard. SENDCOs in our schools collaborate with each other which allows them an extra layer of support for resources and information. The School Improvement Team work closely with the school to highlight any areas of improvement for SEND provision and will support the work to make the improvements. The Trust will also support with any statutory requirements. Schools within our Trust have expert provisions for SEND, and this experience and knowledge would support any SEND provision in other schools joining the Trust. There is also extra CPD for staff with an interest in SEND to gain invaluable experience in this area.

19. How will joining your Trust benefit the achievement and progress of students at our school?

By joining our Trust, the school is able to fully focus on teaching and learning as well as the educational experience each child should receive. Support and challenge from the School Improvement Director, in addition to the sharing of best practice among schools, helps to ensure the best outcomes for children.

20. How will students' achievement and progress be monitored in the Trust and where does accountability for this lie?

The School Improvement Director visits schools regular so there is ongoing dialogue regarding all aspects of school life, including outcomes and progress towards targets. This is a critical friend discussion to look at steps forward and action planning for improvement. The Trust Board's Education Committee monitors interim data which gives Trustees an overview of the work taking place in schools to achieve the best outcomes for our children.

21. How does the Trust monitor and support schools with closing the gap between children eligible for pupil premium, vulnerable and other children?

We believe strongly that all children can achieve regardless of background. Our schools have a higher-than-average number of disadvantaged children, which means our staff are adept at understanding and supporting these children. At Trust level we seek opportunities for our schools to work with a range of agencies and organisations to provide more opportunities for our children. It also means we share good practice across all schools. Our working party for DSLs and family support workers meets regularly and shares resources. It also provides wellbeing support for these colleagues. All conversations focused on attainment and progress prioritise children eligible for Pupil Premium as this ensures closing the gap is always a clear focus.

22. Which aspects of the school's leadership will remain under the school's control and which will come under control of the Trust?

Ultimately the head teacher will be line managed by the CEO of the Trust; in practice performance management is done collaboratively with the chair of governors. The remainder of the leadership team would continue to be managed by the head teacher.

23. Who holds the Trust to account?

The CEO is held to account by the Board of Trustees who are accountable to the Members. The whole Trust is held to account by the Department of Education, the Education Skills Funding Agency and the Regional Schools Commissioner.

24. How is safeguarding affected by joining the Trust?

We firmly believe that Safeguarding is strengthened by joining our Trust. The extensive training we can offer, as well as the support network for DSLs and family support workers, ensures that staff are even more equipped to support our children during the most challenging times. As a Trust we use CPOMS to record and manage all safeguarding incidents. This is monitored at Trust level and supported by our nominated Safeguarding Trustee.

FREQUENTLY ASKED QUESTIONS

25. How do you support the school before, during and after an Ofsted inspection?

The Trust team will support a school in any way needed during an inspection. Our School Improvement Director is a trained, experienced Ofsted Inspector who gives an insight into what to expect and helps schools to be Ofsted ready. We provide targeted support for middle and senior leaders in preparation for inspection. After an inspection, we will review the improvement plan to build on the inspection feedback.

26. Who appoints the head teacher?

The head teacher is appointed by the CEO in collaboration with the Governing Body.

27. How regularly would you expect to be at our school and what sort of things would you envisage doing?

The School Improvement Director visits all schools regularly. This is normally a diarised visit which could be a full day every other week or a half day weekly. However, the support from the School Improvement Director is unlimited and any support will be scheduled according to need. This is in addition to any specific improvement projects. The regular visits include a range of activities that are agreed in advance with the head teacher. These could include lesson visits for staff such as ECTs or ITT colleagues to allow for a range of staff to observe teachers in the early stages of their career. No visits are designed to “catch” staff out; the aim is to work with all our schools effectively and develop positive relationships. The School Improvement Director will be available to support with any lesson observations in line with the processes and schedules established by individual schools.

28. Will there be reviews of school performance against the school improvement plan similar to governor visits and reviews?

The school will monitor its own quality assurance schedule. This will be reviewed by the School Improvement Director.

29. Will there be audits/reviews of local management?

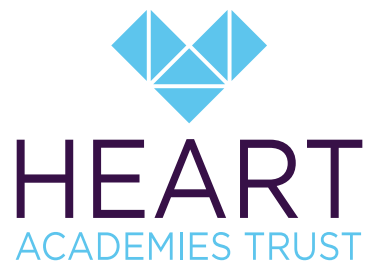
A schedule of operational audits, run by both internal and external auditors, takes place throughout the academic year. These are to ensure that the Trust and its schools remain compliant in areas relating to health and safety, food safety, financial management, GDPR, IT and cyber security, HR and payroll.

30. How does the Trust support the transfer of a school to the Trust, including the TUPE process?

Members of the Trust's central team have extensive experience of transferring schools to a Trust and will support you throughout the process.



NOTES



HIGH EXPECTATIONS ACHIEVEMENT RESPECT TRUST

HEART Academies Trust

Suite C
Emerald Court
Pilgrims Centre
Brickhill Drive
Bedford
MK41 7PZ

T: 01234 290053

E: info@heartacademiestrust.co.uk

W: www.heartacademiestrust.co.uk