

Elliot Foundation Corporate Charge Summary

Document control

Date	Revision/amendment details and reason	By whom
21 March 2014	First draft new format v. 2.0	Hugh Greenway
24 March 2014	Revised inc. all director amends v2.1	Andy Kreppel
24 March 2014	Formatted, added 'presumption of support' to Introduction v2.2	Hugh Greenway
28 th May 2014	Addition of 'Pre-OFSTED inspection' to Education school improvement services; various additions to Development services	Hugh Greenway, Sue Robinson, Simon Adams
29 th May 2014	V2.4 Adopted by TEFAT board	Hugh Greenway

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Introduction

The Elliot Foundation Academies Trust (TEFAT) opened its first academy in September 2012. Consequently this document may be subject to revision as our offering evolves. Nevertheless, TEFAT has established a set of principles that will govern the relationship between the corporate functions of TEFAT and its academies from the outset.

1. **Self determining schools**; so that Principals and senior managers will be expected to be responsible for the management of staff, finances buildings and equipment in the academy
2. **Minimum change**; the only changes that TEFAT requires of converting academies is that they adopt the TEFAT finance and MIS systems in common with all TEFAT academies
3. **Localism**; we will work with school staff and governors during the conversion process on assessing the quality and value for money of the services that support the school and where we are agreed that a change is desirable we will assist in procuring a local alternative provider
4. It is **not our intention to recreate a local education authority**; the pattern of services supporting each academy is likely to vary from region to region and from academy to academy
5. **Partnership working**: TEFAT central professional staff will work with academy principals, staff and governors to develop and refine arrangements for monitoring, support and challenge for TEFAT academies
6. **Presumption of support**: as there is no distinction between TEFAT and its academies when new issues arise academies should assume that the Trust will seek to support and engage accordingly

This document should be viewed in conjunction with the matrix of delegation that is shared on Dendrite.

Education (2%)



Rachel Jones, Education Director

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- Sustaining momentum – always up a gear
- Curriculum innovation and continual horizon scanning
- Standards monitoring, data analysis & trends
- Links to national and international groups

Regional clusters



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Simon Adams, Regional Director, London

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- Regional Director: pace setting, custodian of regional standards
- Facilitated school-to-school networks, coordinating and brokering expertise

Education standards monitoring services provided within the 6%

- Providing a Progress Partner as a single point of contact within TEFAT;
- Visiting at least once each term (In Step academies);
- Visiting half termly (Step Up academies);
- Tailored support planned together with academy leaders (Step In academies)
- Monitoring progress against action plans;
- Brokering support for action plans if required;
- Running data comparisons of similar schools to inform assessment activity;
- Procuring and developing systems to combine performance data consistently for all TEFAT academies and enable efficient and meaningful analysis;
- Using data benchmarking to identify strengths in provision and facilitate sharing of leading practice amongst TEFAT academies; and
- Offering of in-school data provision.

Optional services that TEFAT offer to Academies include:

- Training events;
- Additional consultancy;
- ICT development services; and
- Bespoke analysis and report design.

Education school improvement services provided within the 6%

- Developing a local hub of schools with a regional director who knows them well;
- Providing termly briefing documents and updates on school improvement and policy issues;
- Coordination of regional and national moderation groups;
- Providing a baseline analysis, conducted in partnership with the incoming academy, to establish school improvement support within the Step Programme;
- Annually assessing the school's performance against TEFAT values and determine the level of support required;
- Undertake pre-OFSTED assessments to help identify areas for improvement
- Running data comparisons of similar schools to inform improvement activity;
- Supporting the Principal in revising the improvement plan and setting targets for his/her school;
- Developing a coordinated and collaborative approach to address policy changes as they occur e.g. National Curriculum, assessing without levels;
- Facilitating subject specialist leadership and collaboration across the Foundation (currently English, mathematics, computing, e-learning);
- Hosting and facilitating the online TEFAT community, providing a portal to share resources, create forums for specialist areas, and provide regular CPD opportunities e.g. webinars;
- Brokering academy to academy support across the Foundation;
- Brokering support from the national network of expertise e.g. NLE, LLE and Teaching Schools, Education Endowment Foundation;
- Brokering partnerships and beneficial fees with respected national organisations e.g. [NACE](#), [NASEN](#), [Achievement for All](#), [NAACE](#), [Whole Education](#);
- Supporting the Governing Body in the performance management of the Principal;
- Exceptionally providing interventions to support (e.g. public meetings) the academy and governors in line with the TEFAT Step Programme;
- Exceptionally, appointing TEFAT executives to GB to achieve emergency turnaround; and
- Representing the interests of TEFAT academies with national bodies such as the DfE, Education Funding Agency and the National College;

Elements of monitoring and improvement may be provided by TEFAT partner organisations, all specialists in their field. See our separate document detailing the TEFAT InStep Programme.

Optional services that TEFAT offer to Academies include:

- Attendance at the TEFAT annual conference, to be developed through a TEFAT Steering Group of academy representatives;
- Additional consultancy and school improvement services beyond the core Step Programme;
- Staff continuing professional development, both school and cluster based);
- Staff continuing professional development (additional tailored online provision);
- Specialist expert support e.g. EAL, Traveller Education, ICT, SEN;
- ICT Procurement (advised by a TEFAT Steering Group of academy representatives which enables specialist expertise to select best of breed products to match educational priorities alongside securing bulk purchasing deals).

Development



Sue Robinson, Development Director

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- Partnering for progress, peer monitoring, coaching, forum for next practice
- Planning succession - CPD pathways with TSAs and Universities

Development services provided within the 6%

- Linking and networking with other organisations to facilitate and support learning partnerships and leadership opportunities which include: Teaching Schools/Council, LAs, Universities, National College, Education Trusts, Teaching Leaders, Leadership Curriculum Licensees, school and professional development partnerships and research organisations (BELMAS)
- Developing, maintaining and quality assuring a Learning Partnerships Directory, with guidance and associated forms to support system leadership
- Create and develop Professional Development Pathways for all staff in all clusters of TEFAT academies to include: Teaching staff development for Initial Teacher Training (ITT), both postgraduate and School Direct; Newly and Recently Qualified Teachers (N/RQTs); Middle Leadership; Senior Leadership; Aspirant Principals, and new and experienced/Executive Principals. Leadership development opportunities for non- teaching leadership staff together with teaching support staff
- Induction for new principals
- Governor development days and core development programme
- Cross cluster curriculum conferences and a leadership conference
- Encouraging broadening of experience by role sharing and joint initiatives
- Proposing research areas and publishing results
- Brokering bespoke Masters, Ed D and PhD and other post-graduate provision
- Creating a social learning environment for all staff
- Attendance across the clusters at Principals' Regional Meetings
- Meeting with Principals as required to support individual development needs

Optional services that TEFAT offer to Academies include:

- Support for Teaching School applications
- Facilitation and chairing at training events
- Support for the development of 'in house' training and development programmes
- Editing or writing case studies on behalf of academies
- Advice and support for qualifications/career planning
- Research support and advice for academies or working groups on the choice of research project, questions and instruments, analysis and publication of research material

Finance (1.5%)



Rob Barr, Finance Director

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- Strategic financial planning
- Budget support, production of year end financial statements & external audit

Finance services provided within the 6%

- Group-wide financial accounting system to enable all schools to input and access data on a common platform;
- Treasury and cash flow planning
- Day to day transactional finance support;
- Advice & emergency assistance
- Making appropriate arrangements for financial assurance;
- Supporting the annual budget process and ensuring submitted to EFA within deadlines;
- Submitting financial reports to EFA and other agencies in required formats and timescales; and
- Setting group-wide financial policies, where they go beyond the EFA handbook.
- Production of annual account for the Elliot Foundation Academies Trust
- External audit of the Elliot Foundation Academies Trust including the accounts for all Elliot Foundation Academies Trust academies
- Procurement service and insurance support.

Optional services that TEFAT offer to Academies include:

- Bookkeeping or academy business manager;
- Intensive support in cases of financial stress or unusually complex financing structures (for example, in relation to property); and
- Finance IT systems training beyond initial induction.

HR & Governance (1%)



Bob Anderson, HR & Governance Director

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HR & Governance services provided within the 6%

- Negotiations nationally with trade unions and professional associations;
- Providing employment policies and procedures;
- TEFAT-standard letters and documents;
- Periodically reviewing human resources issues and practice across TEFAT and dissemination of best practice;
- Regular updates and gatekeeping items;
- Strategic human resources advice including restructuring and succession planning
- Employee Assistance Programme for all staff;
- Strategic governance support including Governors Handbook and Governors Toolkit
- Specific LGB core development programme where required to meet TEFAT aims
- Ensuring that the LGB is focused on supporting school improvement priorities;
- Actively supporting the recruitment process for principal and/or vice principal.
- Membership of The Key (management support and research)
- Membership of TEN Governor Support for all governors
- Support for strategic management issues including admissions, LA liaison and issues resolution
- External Safeguarding Audit and annual self-review tool
- Provision of legal representation for Employment Tribunal cases

Optional additional services available at cost include:

- Quality-assured operational HR consultancy support;
- Support for staff recruitment other than principal and/or vice principal;
- Assistance in administration of DBS disclosures;
- Occupational Health; and job and role evaluation.

FM, Estates and Compliance (0.5%)



Trish Martin, Estates Director

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Estates and FM services provided within the 6%

- Conducting an annual audit of:
 - Health & safety;
 - Asbestos management;
 - Premises;
 - And H&S Policies
- Provision of a 24 hour support helpline for property advice
- Provision of a 24 hour support helpline for H&S advice
- Site survey conducted every 2 years with projected 5 year costs and associated asset strategy
- A suite of H&S policies and procedures to be adopted by the school
- Support and guidance arising from accidents reported by schools, including managing RIDDOR process on behalf of the school
- Provision of annual H&S awareness training courses :
 - Half day for all TEFAT Principals and chairs of governors
 - Full day for all TEFAT site managers

Optional services that TEFAT offer to Academies include:

- Additional consultancy and training on compliance issues;
- Consultancy support in devising and implementing strategic premises plans; and
- Professional and technical project management for capital works;
- Access to an approved panel of contractors for delivery of small works;
- Review of asbestos plan
- Legionella testing
- Support health and safety issues for proposed minor works, including the vetting of method statements and risk assessments.
- Accident Investigation when needed for an accident to a member of staff in order to coordinate evidence against a potential claim.
- Annual review of the school Fire Risk Assessment
- Health and Safety training needs analysis to ensure that training is only conducted when necessary
- Assistance with the completion of Educational Visit Risk Assessments
- Funding Applications- Sport England etc
- Energy Advice and Management

The Trust (1%)



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Andy Kreppel, Programme Director

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Corporate services provided within the 6%

- Creative, innovative and refreshing leadership
- Strategic direction
- Ministerial and DfE representation and lobbying, representing the Trust and the Trust's Academies point of view to key Governmental stakeholders
- PR, marketing and communications support, representing the Trust and developing positive PR for the Trust and our Academies
- Crisis management support
- Project management support
- IT and systems support
- Risk management, managing the risk profile for the Trust and our Academies
- Contingency fund