

ELLIOT FOUNDATION

HANDBOOK 2025/26



Table of contents

Purpose and principles.....	3	SEND support (Team Purple).....	14
Operating principles.....	3	SEND system improvement.....	14
Central team - who does what?.....	5	EHCP escalation.....	14
Governance - How TEFAT works.....	6	SEND Regional Leads.....	14
Accountability.....	6	SEND website and Glossary.....	15
Feedback loops.....	7	Legal support	15
Pupil voice.....	7	Access to education.....	15
Parent voice.....	7	Parental complaints.....	15
Staff voice.....	7	Workforce development.....	16
School Leader Voice.....	7	Safeguarding training.....	16
Community Councils.....	7	Early Career Framework (formerly	
Principals' Hangouts & Principals'		NQT training).....	16
Survey.....	8	Expert Practitioners.....	16
Governance of schools with		Professional development.....	16
Community Councils.....	8	Communities of practice.....	16
Governance of schools requiring		Apprenticeships.....	17
additional support.....	9	E-learning.....	17
How much does it cost?.....	10	Research School Programmes.....	17
Core services.....	10	Finance support.....	17
Centrally procured bundled costs.....	10	Budgeting, financial planning and	
Membership services.....	11	forecasting.....	18
Safeguarding support.....	11	Financial control.....	19
Safeguarding reviews.....	11	Banking and payments.....	19
Safeguarding workgroup.....	11	Audit.....	19
Supervision for safeguarding staff....	11	Payroll and Pensions.....	20
Safer recruitment & SCR.....	11	Procurement support.....	20
Monitoring and filtering.....	11	Mandated suppliers.....	20
Education support.....	12	Areas with preferred suppliers.....	21
School Triangulation - "Baseline".....	12	HR support.....	21
Pre-Ofsted Effectiveness.....	12	Management of employee related	
Attendance and behaviour support...	12	matters.....	21
School Improvement Planning.....	12	Operational HR within schools.....	21
School monitoring.....	13	HR system linked to payroll and	
Ofsted inspection.....	13	pensions.....	22
Curriculum development.....	13	HR training.....	22
Early years.....	13	HR reporting, including statutory	
		reporting.....	22
		Estates support.....	22
		Technical support & compliance.....	23

Health and Safety.....	23
Health & Safety Procedures.....	23
RIDDOR.....	23
IT support.....	24
IT infrastructure (broadband, switches, access points and wifi routers).....	24
IT hardware (classroom screens & chromebooks).....	25
Serverless schools.....	25
Photocopying & printing.....	25
Filtering, monitoring & cyber security... 25	
IT support.....	26
Risk management support.....	26
Approach to risk management.....	26
School risk assessment support.....	26
Public health risks.....	26
Critical incident support.....	27
Miscellaneous.....	27
Social media.....	27
Press, PR and marketing.....	27
Community Box Programme and Community Partnership Hubs.....	28
Additional resources.....	29

Purpose and principles

The Elliot Foundation is a values-led organisation. Our shared values have evolved over time in consultation with all of our stakeholders. They underpin everything we do.

Elliot Values



Put children first

We trust and value your professionalism.
We share the responsibility for the learning and welfare of all of our children.
Our purpose is to improve the lives of children.



Be open to change

If you can see a better way, suggest it.
If someone else suggests a better way to you, consider it.
We exist to nurture innovators and support those who take informed risks in the interests of children.



Be safe

Look after yourself, your colleagues and all children.
We are all responsible for each other's safety and well being.
Discuss any concerns with an appropriate member of staff.
Don't assume that someone else will do it.



Forgive yourself and others

We all make mistakes.
Admit them, learn from them and move on.



Be kind and respect all

People are allowed to be different as are you.
Kindness creates the positive environment we all need to flourish.
This kindness should extend to ourselves as well as to others.



Be the change you want to see

Making the world a better place starts with you.
Model the behaviour that you would like to see from others.



Operating principles

The Elliot Foundation Academies Trust (TEFAT) is an established medium sized charitable trust with over 2,000 staff in 36 schools serving over 15,000 children and their families at the time of writing. It is part of our ethos that we will never be 'established'. We will innovate continuously and develop services with a view to improving outcomes for all our children and staff. Consequently this document may be subject to change as our offering evolves.

TEFAT has established a set of principles that govern the complex relationship between the corporate functions of the Trust and the schools it operates. These were conceived to support the Trust's Values.

1. **Subsidiarity**; if something is best controlled at a school level, then it should be. TEFAT Principals are responsible for the management of staff, curriculum, finances, buildings and equipment in their academies. The centre should only directly intervene where there are clear benefits, legal obligations or where risk is obviously reduced by doing so (e.g. as the common employer of all staff and as the responsible body). But as the responsible body we do challenge local decisions as appropriate.

2. **One Trust;** all stakeholders are part of one Trust and encouraged to think of the benefits to all children not just those who are closest
3. **No change for the sake of change;** we do not change the name, the ethos, the uniform, the set up of a school. All we ask of our schools is to
 - a. Embrace our values
 - b. Adopt our systems
 - c. Adhere to our scheme of delegation and follow our policies
4. We are **not a local authority**, nor do we seek to become one. The pattern of services we provide to each school may vary from region to region and from school to school.
5. **Partnership working;** TEFAT central staff will work constructively with school Principals, staff and community councillors to develop and refine arrangements to best monitor, support and challenge each school.
6. **Presumption of support;** there is no distinction between the Trust and its schools. We are all part of one entity. When a new issue arises, schools should assume that the Trust will aim to support within the limits of our available resources and not to the significant detriment of our other schools.

Central team - who does what?

The Ops Group, which is how our central team at TEFAT is known, operates on a first among equals basis with collective responsibility. We have always tried to keep TEFAT as flat an organisation as possible so that we remain as close to our children as possible.

 Travis Latham Senior Regional Director (West Midlands) Lead the development and growth of sustainable school clusters. Facilitate partnership working and strategically plan, commission and QA services to schools. - Accountable for the education provided to 4,000 children in 10 schools - Line management of 3 Executive Principals and 6 Principals - Maintain and develop Trust relationships with Regional Directors at Ofsted and DfE	 Caroline Oliver Regional Director (East Anglia) Lead the development and growth of sustainable school clusters. Facilitate partnership working and strategically plan, commission and QA services to schools.. - Accountable for the education provided to 4,500 children in 10 schools - Line management of 2 Exec Principals and 6 Principals facilitate continual improvement - Responsible for Safeguarding across the Trust	 Kate Redman Regional Director (London) Lead the development and growth of sustainable school clusters. Facilitate partnership working and strategically plan, commission and QA services to schools.. - Accountable for the education provided to 5,000 children in 10 schools - Line management of 1 Exec Principal and 8 Principals	 Allan Shephard Regional Director (West Midlands) Lead the development and growth of sustainable school clusters. Facilitate partnership working and strategically plan, commission and QA services to schools - Accountable for the education provided to children in 5 schools in the Trust. - Line management of 3 Principals
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As part of the Operations Group

- Maintain systems that improve outcomes for all children in all Trust schools
- Identify and mitigate risks to the above
- Innovate and lobby government in the interests of the sector as a whole



 Jo Clifton Director of Curriculum & Development Responsible for improving the quality of curricula and teaching in all Trust schools and virtual learning platforms - Improve the efficiency of learning for children and adults in the Trust - To develop teaching and grow capacity for the future - Line management of Regional Innovation Leads and co-ordination of Regional Improvement Leads	 Emma Lloyd Director of SEND & Inclusion To implement a Trust-wide inclusion strategy, ensuring compliance with SEND legislation and the SEND Code of Practice - To collaborate with other directors to foster inclusion - To act as a crucial point for resolving complex SEND and inclusion issues in line with Trust policies.	 Trish Martin Director of Estates & H&S To make the Elliot Foundation a better place in which to work and learn by improving the school environment over time. - Ensuring and assuring a safe and legally compliant school estate - Line management of Regional Estates Leads - Responsible for health and safety across	 Andy Kreppel Programme Director [Sweeper Keeper] To fix everything else... And identify the things that need fixing that we don't yet know about. - Responsible for programme management Strategic procurement - Organisation, IT and systems design - Risk management (with CEO)
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As part of the Operations Group

- Maintain systems that improve outcomes for all children in all Trust schools
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 Hugh Greenway CEO & Accounting Officer In all respects to provide refreshing leadership of the Elliot Foundation. To ensure the successful growth of the Trust, its children, staff and schools. • Accountable for the safety of 13,500 children, the improvement of outcomes for 36 schools and the proper allocation of £100m+ of public money • To ensure the Ops Group functions as a continuously improving multi-disciplinary team with a first among equals approach	 Simon Pink Finance Director To ensure the successful growth & sustained development of the Elliot Foundation through the provision of system-leading financial management • To create and maintain financial & management accounting, budgeting and compliance systems across the Trust to support its charitable purpose • Strategic planning to enable sustainability and continuous improvement	 Ruth Dickens HR Director To make the Elliot Foundation an employer of choice in the education sector • To develop a positive, collaborative culture that inspires and attracts staff • To support schools in the attraction, development and retention of staff • To ensure compliance with employment legislation and manage contentious and complex issues for schools
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As part of the Operations Group

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For more detail on the function of each directorate please refer to the latest copy of [functional responsibilities](#).

Governance - How TEFAT works

Academies exist because the governance of maintained schools in this country has never been particularly good. The idea behind an academy was to remove a school from the bureaucratic and political control of a local authority and to give it to a charitable trust whose sole purpose is to improve education in its schools. This “freedom” and focus ought to lead to improvements. However, this does not happen automatically.

The TEFAT approach to governance is explained in more detail in our paper [Plain English Governance](#).

Accountability

Principals are directly accountable to their respective Regional Director, who agrees their annual targets and conducts their performance management. Regional directors are accountable to the CEO, who is in turn accountable to the Board of Trustees and directly to Parliament. The diagrams below show how we balance accountability with support and ensuring that the voices of all stakeholders are heard in effective feedback loops.

Feedback loops

In order to prevent creeping bureaucracy and unnecessary hierarchy, TEFAT has feedback loops baked into its governance structure. These exist to ensure that all stakeholder voices are heard at all levels of the Trust and should insure against groupthink and self-justifying senior leadership.

Pupil voice

All TEFAT schools will have a Pupils' Council. The make up and remit of these councils will vary from school to school. But in some schools children are even involved in providing feedback to teachers on the quality of teaching. In addition, all year 6 pupils are surveyed every year about their views of their school. The results of this survey are shared with Academic and Trust Boards.

Parent voice

All parents and carers of children in TEFAT schools are surveyed anonymously three times a year about their opinions of their child's school. These survey results are explored at Governance Review meetings with Regional Directors and the Ops Group. They are also shared with the Academic and Trust Boards and included in the Trust's Annual Report.

Staff voice

All staff in TEFAT schools are surveyed anonymously three times a year about their opinions of their school. These survey results are also explored at Governance Review meetings with Regional Directors and the Ops Group, shared with the Academic and Trust Boards and included in the Trust's Annual Report.

School Leader Voice

Every year in the autumn term TEFAT seeks the views of its Principals to establish their perspective on the quality of service provided by the Trust. These interviews are collated in a report which is shared with the Academic and Trust Boards. In January the CEO publishes the report to all Principals together with the Ops Group's responses to issues which have been raised.

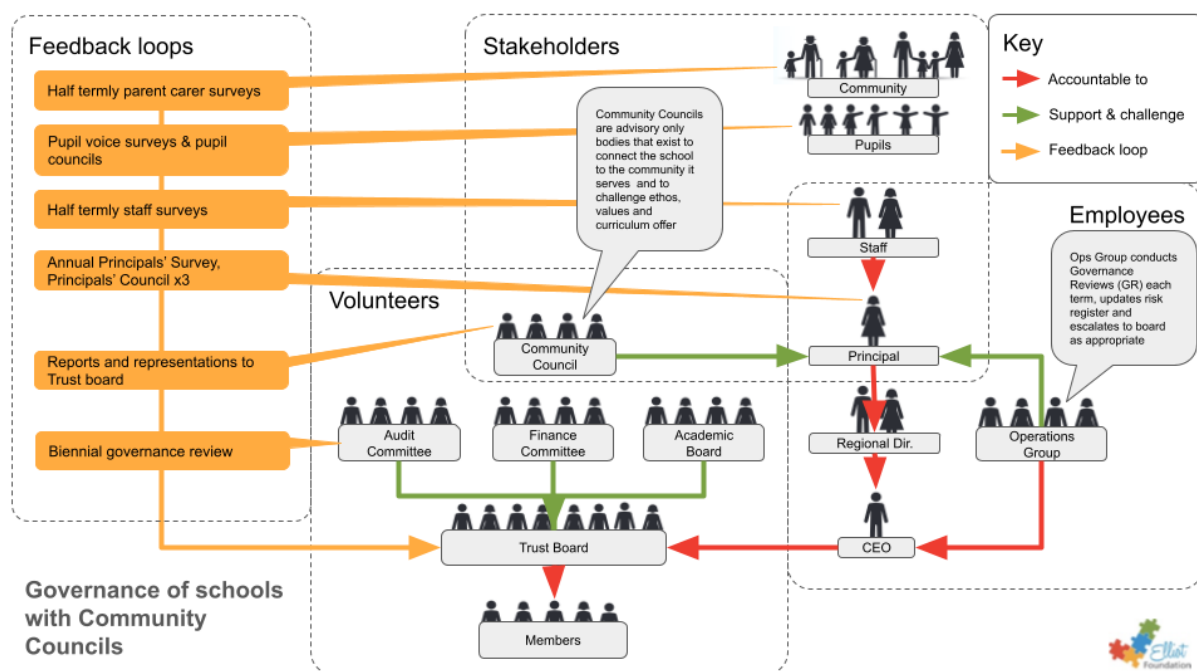
Community Councils

Community Councils are advisory only bodies that exist to support and challenge schools on their ethos, curriculum and pupil wellbeing. They should have parental representation as well as staff and other stakeholders in the community that the school serves. They do not have involvement in finance, HR, Estates or compliance which are dealt with by the Ops Group Governance Review Process. Community Councils are supported by the Trust Community Council Coordinator.

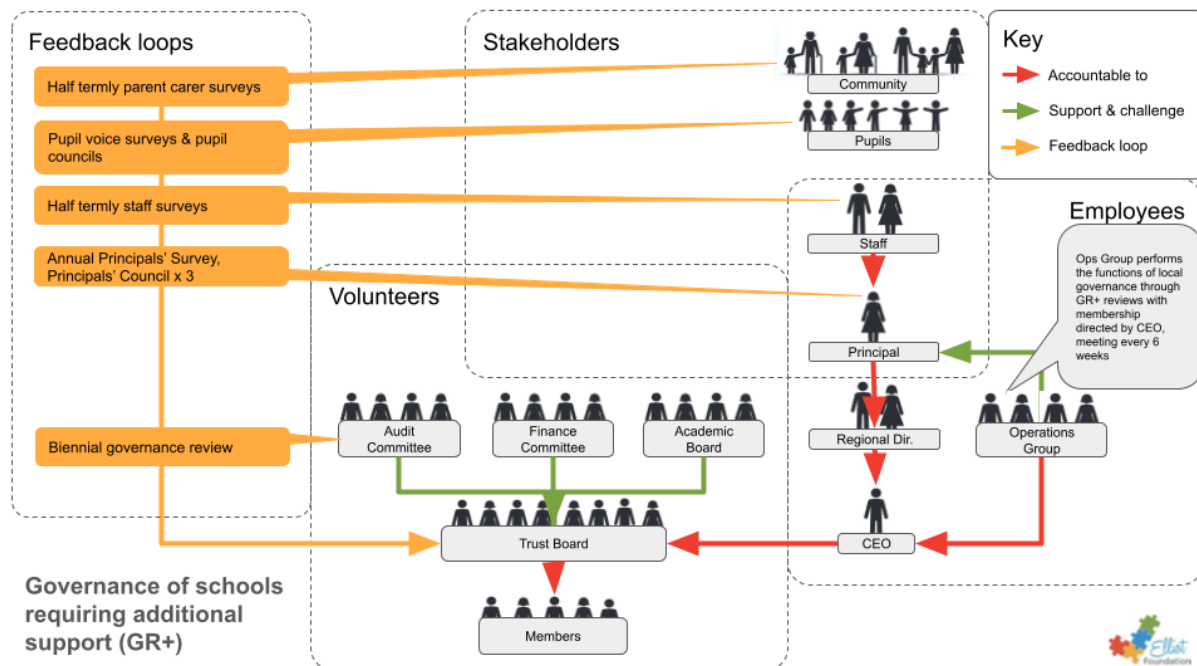
Principals' Hangouts & Principals' Survey

TEFAT brings its Principals together in person regularly. The Ops Group issues a fortnightly briefing to keep school leadership abreast of what they need to know. This is accompanied by a 30-45 minute virtual meeting at which Principals get to question any updates provided or share current concerns. Each term Principals get together in person with the Central Team to spend a day thrashing through live concerns and priorities. In the spring term this meeting is a two-day residential conference to which external speakers and thought leaders are invited.

Governance of schools with Community Councils



Governance of schools requiring additional support



How much does it cost?

Whilst we will always endeavour to raise funds to minimise the cost to schools, we could not operate without charging a fee to our academies. Some of the costs of this will be offset for new joiners by removing no longer needed contracts with local authorities or paying separately for services covered in this document. Any 'de-delegated' deductions from grants by local authorities will also now come to the academy instead.

TEFAT retains 7.85% of basic GAG funds at the centre to cover the costs of its administration and the costs of funded school support, including centrally mandated contracts and IT procurement.

At its simplest, the management fee covers all the services itemised in this handbook, including support and development services that go back into those schools that need them. It also covers many of the services and IT hardware that any school would normally need to purchase anyway, irrespective of status.

The 7.85% covers a range of different aspects:

- About 3% currently goes to paying for central staff with Trust wide responsibilities, plus the costs of running the head office space and governance costs.
- About 2.6% currently goes on staffing that directly supports schools in our regions, plus school improvement support and programmes.
- 1.5% goes on centrally mandated systems. These are systems that are centrally directed to ensure efficiency and effectiveness of operations and to achieve consistency and economies of scale. Examples include MIS, accounting, payroll, safeguarding, SEN, broadband, IT monitoring and filtering and insurance charges.
- 0.75% goes on direct IT hardware procurement, such as ChromeBooks and IWBs. Each school receives a set allowance each year based on pupil numbers which seeks to ensure that agreed levels of devices are maintained and refreshed to reflect their lifespans.

The 7.85% is levied on the main GAG amount as set out in the annual funding letter. Any additional grants received, such as Teacher Pay and Pension Grants, Core Schools Budget Grant or Pupil Premium will not be included in the calculation.

More detail can be seen in this [document](#).

Membership services

Safeguarding support

Safeguarding reviews

All TEFAT schools are supported to complete an annual self evaluation audit which identifies priorities for national and regional training. An onsite audit is led annually by the National Safeguarding Manager and/or Regional Safeguarding Ambassadors. This supports school safeguarding teams to jointly evaluate their local processes and systems whilst identifying training needs.

Safeguarding workgroup

All Designated Safeguarding Leads (DSLs) are supported through national safeguarding network meetings at the start and the end of each academic year. Regional network meetings are held locally twice a year, led by the Regional Safeguarding Ambassadors and quality assured by the National Safeguarding Manager. There is a professional development input at each meeting with the opportunity for DSLs to network and share resources and strategies to support their case work. The [TEFAT safeguarding site](#) is a platform to share resources and signpost schools to local support groups. TEFAT 'spaces' enable all safeguarding teams to share resources, raise questions and seek support from colleagues throughout the year.

Supervision for safeguarding staff

Safeguarding supervision is commissioned externally to ensure each DSL receives two hours of professional supervision within the regional network meetings. In addition to this scheduled supervision, any member of the safeguarding team can book a 1-2-1 virtual supervision session with the National Safeguarding Manager throughout the academic year if required.

Safer recruitment & SCR

All TEFAT schools are supported and trained to understand and fulfil their safer recruitment responsibilities in relation to staff and regular visitors and volunteers. They use a standardised SCR template, this is monitored through monthly HR meetings, termly data checks, regular visit and volunteer checks and annual personnel file audits.

Monitoring and filtering

See "Filtering monitoring and cyber security" below in the IT section

Education support

School Triangulation - “Baseline”

Before any school joins the Elliot Foundation it is essential that we establish a common understanding of the school’s strengths and weaknesses and a shared ambition for improvement. This has nothing to do with Ofsted judgements and is about developing trust and openness. The school is evaluated against our rubrics. The process includes discussions with leaders, staff and pupil voice and considering all areas of the school’s work, including where the school has areas of expertise to share more widely. The final report starts with areas that the school should be proud to share and moves on to actions for improvement. This report feeds into our academy improvement planning process. We identify opportunities for the school to share practice with others and to collaborate. We will recognise talented staff who could join our expert practitioner programme and provide capacity to the Trust as well as identifying support for your school priorities.

Pre-Ofsted Effectiveness

Although it is clear from the accountability section above that we share the responsibility for Ofsted judgements with our Principals, we understand that accountability weighs heavily on school leaders. Consequently we are happy to provide a version of our “Baseline” process to existing schools to help prepare them for an Ofsted inspection. We will regularly update Principals about inspection so that they have the most relevant and up to date information.

Attendance and behaviour support

We believe that we should always be led by our values. Children come to school with a wide range of life experiences and, therefore, we ask all of our schools to see the child in front of them and to think about what any child is communicating to us through their behaviour. We will support you to develop policies and structures within school as needed, with consistent expectations of everyone but with reasonable adaptations for those who need it. We will also help you with attendance monitoring and analysis systems and can provide additional expertise as required.

School Improvement Planning

We have worked with our Principals on a shared definition of school effectiveness. This has been captured in our rubrics which identify what effective provision looks like in terms of teaching, assessment, the curriculum, early years, SEND and academic standards. The rubrics are updated regularly in discussion with school leaders. The outcomes of the rubrics inform our school improvement planning process. We have created an academy development plan structure which we support our schools to complete. The priority areas

then inform Trust-wide development and support programmes as well as individual support for schools as identified. We use our expert practitioners to provide school to school support and training for the priority areas in our education plan.

School monitoring

Each TEFAT Principal reports directly to their respective Regional Director who is responsible for their performance management. The Regional Director also has oversight for commissioning and supporting school improvement and ensuring pastoral care. Regular school visits are planned in order to ensure support for schools' identified priorities, pupil outcomes and quality of provision are appropriate and of a high quality. These planned visits are carried out as part of a supportive process. Additional capacity can also be brokered through Progress Partners, Expert Practitioners, Regional SEND leads or external consultants.

Ofsted inspection

When Ofsted call, we will be with you. You should inform your Regional Director as soon as possible after receiving the phone call, usually on a Monday morning. Your Regional Director will be onsite for both days and quite often will join you for planning the day before. Depending on the degree of risk another Education Director may attend for the first or both days. The CEO will also try to attend in person, usually on the morning of day two.

Curriculum development

We have identified the principles of high quality curriculum provision, which include leadership, systems and impact. We believe the school's curriculum should be relevant to the community that the school serves and be rooted in the history and culture of the locality. Children and their families should not receive a 'done to' curriculum offer but should be partners and valued for what they bring. We do not have an 'Elliot Foundation curriculum' that we expect you to follow. However, we do expect you to have an ambitious broad and exciting curriculum in place with high aspirations and a focus on supporting children to become active citizens. We place a strong focus on pupil voice and developing the key skills of independence, creativity and communication. We support our young people in respecting and valuing difference and recognise that young people communicate and contribute in different ways. We have a strong tradition of developing outstanding arts provision and have many events across the Trust in dance, music and drama to celebrate our achievements.

Early years

Our early years networks meet half termly to discuss regional and national priorities and to share practice in our schools. They are always lively, engaging events led by passionate practitioners who are keen to develop their practice in creative and innovative ways.

Commissioning targeted support

In addition to the support that the central team and your Regional Director provides we also commission additional support. This support can be commissioned from another TEFAT school or from an external partner. Discussions regarding the nature, frequency and expected outcomes will be completed prior to the support being commissioned. A record will be made of the support in order to ensure that the intended impact is achieved. Schools that are considered more vulnerable are likely to receive more support in order for them to make the rapid improvements necessary.

SEND support

SEND system improvement

Schools have historically been left on their own to navigate a complex and contradictory set of processes around SEN, in which the LA is an interested party that also acts as assessor, funder and arbitrator. Team Purple seeks to improve system knowledge and legal expertise at a school level so that schools feel more confident in dealing with issues as they arise whilst also knowing that Team Purple is at the end of the phone for the trickier stuff.

EHCP escalation

Across the Trust we are seeing a rapid growth in requests to assess to meet ever more complex needs, a very high conversion rate of those requests into EHCPs and a growing number of pupils with EHCPs who are remaining with us longer. Securing EHCPs and ensuring that they are appropriately funded is a challenge and an area where significant central support is provided; EHCP income initially increased by 20% on the back of this support. Equally, it is important that where a pupil is inappropriately placed the Annual Review process is fit for purpose in bringing about a change in setting and that our families are supported to explore legal routes for challenge when appropriate to do so. Again significant central support is provided to SENDCos and school leaders in this.

SEND Regional Leads

All schools have access to support from their Regional SEND Lead. Each SEND Lead is a highly skilled and experienced practitioner, passionate about meeting the needs of all learners. They provide face to face and strategic support for schools, working to build capacity through the sharing of expertise. They facilitate a termly meeting for SENDCos within their region alongside leading and signposting training opportunities for all staff.

SEND website and Glossary

All schools have access to the Trust's SEND website. The SEND website is a platform which details the Trust's vision and values for SEND. It also offers legal guidance regarding the associated statutory processes, quality assured external resources and handbooks, and internally generated interventions and assessments. SENDCos have the opportunity to design resources for the site in collaboration with colleagues during Regional SENDCo meetings. This ensures that resources are bespoke to the Trust, have proven effectiveness upon implementation and can be continuously revised.

The SEND website also contains a SEND glossary. The SEND glossary is a compilation of frequently used SEND terms and their respective definitions. Where possible, the definitions reference relevant statute and case law. A common glossary of terms provides clarity and supports a consistency of approach to SEND across the Trust.

Legal support

Access to education

Support is provided for the many and varied aspects of access to education; admissions, attendance (focus on severe absence), part time timetables, CME, exclusions (suspension and P/EX) and SEND / EHCP from assessment through to First Tier tribunal. The developing complexity of cohorts that many of our schools are now working to support means that additional learning spaces are being created across the Trust. Legal advice and support is therefore available for the development of both formal and informal provision offers, namely ARP, SRP, SLCN, ASD and Nurture provision

Parental complaints

As school leaders you will be aware that society has fragmented over the last decade. One of the areas where this most directly affects your day to day life is the volume and vituperativeness of parental complaints. Part of this is a social change that where previously an issue would be raised in person at pick up or drop off and could be discussed often now the first port of call is a vicious keyboard outburst. Support is provided to successfully navigate, in line with Trust policy, complaints and to maintain a focus on securing resolution as swiftly as possible. Support is also provided as and when responses to external agencies are required.

Data protection

Oversight of Trust wide systems, processes and policy to ensure that personal data is processed and kept safe in line with GDPR data controller requirements. Advice and support to schools on their obligations as data processors under GDPR; FOI / Subject Access Requests, data breaches, impact assessments. Our DPO is katie.stobbs@elliottfoundation.co.uk.

Workforce development

Safeguarding training

The National and Regional network meetings provide training opportunities focused on an aspect identified through MIS data and/or DSL feedback. The National Safeguarding Manager leads regional refresher DSL training across the year. Local safeguarding training is supported through a Trust procured online learning platform called 'Flick'. Training and quality assurance of the Trust MIS system for recording concerns is supported through online videos, regional network meetings and as part of onsite annual audits. This also includes Safer Recruitment training and other HR training.

Early Career Framework (formerly NQT training)

Our partner for ECT training is Best Practice Network. We have a national conference for ECTs from all regions at the start of the year followed by regular regional days to support ECTs to network with colleagues in other schools.

Expert Practitioners

TEFAT operates a highly effective process and system of identifying strong practice in all areas of school life (Teaching, Leadership, SEND, HR, Safeguarding, Curriculum and early years). We work with schools to identify strong practitioners who would be willing to offer local or national support. Expert practitioners are offered additional CPD to further develop their skills and knowledge in a wide variety of areas.

Professional development

We offer a wide range of professional development opportunities for many roles that work in schools. We have recently engaged with the Open University on Reading for Pleasure, the Royal Opera House on dance, music and design as well as middle leadership and Jogo Behaviour Support on inclusive practice. We have our own internal offer which includes specialist training for key year groups, Ofsted briefings and subject leader development.

Communities of practice

In order to ensure that the support TEFAT provides to its schools is directly informed by their needs and day to day realities, we run a number of networks that bring together staff from different schools around specific areas of practice. These groups receive targeted training throughout the year, share current issues and challenges and get to work on policy and practice development.

Our current communities of practice are:

- Safeguarding Group - led by Caroline Oliver
- Curriculum Development Group - led by Johanne Clifton
- EYFS Group - led by Johanne Clifton
- SEND Group - led by Emma Lloyd
- Recruitment & Retention Group (inc EDI) - led by Ruth Dickens and Charlene Whittingham
- Sustainability Group - led by Simon Pink
- Finance Lead Group - led by Simon Pink
- HR Lead Group - led by Ruth Dickens
- Estates Lead Group - led by Trish Martin
- Innovation Group - led by Hugh Greenway and Andy Kreppel

Apprenticeships

TEFAT is an approved apprenticeship provider. Currently, we offer Teaching Assistant Level 3, Business and Admin Level 2 and Wellbeing leads Level 3. We also offer a Masters in Educational Leadership with Birmingham University. TEFAT also supports staff to complete a broad range of apprenticeships relevant to their job role and aspirations via external providers.

E-learning

The Trust has an unlimited use contract with Flick Learning, who provide a whole range of statutory and non statutory e-learning courses from Safeguarding, Safer Recruitment, Fire safety, and Prevent duties through to manual handling and asbestos management.

Research School Programmes

We are proud to have an EEF Research School as part of the Trust. Billesley Research School works with a wide range of partners, including academy trusts, teaching schools and local authorities. The Research School works with the Trust on at least one development programme a year linked to priorities in the Education Plan and offers regular opportunities to join other training throughout the year.

Finance support

The principle of subsidiarity means that finance decisions should be taken as close to the pupil as possible. As such it is for academy principals to decide on their priorities for their budgets. The Trust operates a relatively small central finance function, with a Finance Director (Simon Pink), Financial Controller (Deleen Mandi), Finance Officer (Rebekah Blake), Payroll Manager (Michael Grimmett) plus four Finance Business Partners (Alan Care and Kate Brown - West Midlands, Sally Bridgeman - East Anglia and Mustafa Aden - London, shared with Deleen Mandi, plus head office finance) . As set out below we do

mandate a certain number of central contracts where this supports meeting our statutory obligations, or where economies of scale make any other approach inefficient.

Every school has a named Finance Business Partner, who will get to know their schools and support and challenge schools with everything finance related. These are experienced financial professionals who understand the challenges in our academies, especially in an era where budgets have been cut in real terms for many years. They will also work closely with finance staff in schools, who are still managed within the school, but by necessity will have a close relationship with their business partner. Business partners will take responsibility for training school staff on financial systems and procedures, and will also undertake some processes themselves (such as around month end) where it is more efficient to do so. They should also be involved in any finance staff recruitment. The use of the business partner model should mean that schools no longer require a high level School Business Manager due to the support provided centrally.

Budgeting, financial planning and forecasting

There has never been a time where accurate budgeting and forecasting has been more important, due to the squeeze on budgets, especially in the primary sector since 2010. Your Finance Business Partner will work with schools to set a balanced and robust budget each year. This will start once the October census is completed as that census drives funding for the following year. Formal funding letters come from the DfE around late February early March each year. Final budgets will need to be approved by the Trustees in July.

Being in a Trust of this size means that useful benchmarking data will be provided to look at trend data and areas where efficiencies may be found. These can be found in finance workbooks that are updated and improved each year. We do however recognise that schools all have their own individual challenges and are not uniform.

All schools must strive to set a balanced budget each year. If this is truly not possible (usually due to falling pupil numbers) and every effort has been made as agreed with the regional director, then a licenced deficit can be set if approved by the Finance Committee. If for any reason a school drops into a cumulative deficit (i.e. runs out of reserves) then it is expected that a plan is put in place to return to a cumulative positive position within three years. The Trust does not have central reserves, or the ability to borrow funds, so any school in deficit is effectively borrowing from our other schools.

At a minimum the Finance Business Partner meets with the school on a monthly basis to review the current financial position and revise year end forecasts. It is important they also meet the Principal during that day to discuss the latest position and ensure that any local decisions with financial impacts are captured.

Financial control

All schools must follow the Scheme of Delegation, which is reviewed annually. There are also Trust wide policies covering key areas, such as procurement, which set out when three quotes, or a tender process may be required. All expenditure should be approved in advance by using purchase orders. Schools can approve expenditure up to £10k, anything above that is routed to the Finance Director to approve. Approval above £50k requires Finance Committee approval as well. Approval is not withheld without a very good reason.

The legal position is that all school reserves are owned by the Trust and not individual schools. This is reflected in our accounts. If a school wants to access any reserves in the year, beyond what was agreed in the budget, then they will need Finance Committee Approval. That approval process will make reference to the level of the Trust reserves that were generated by the school requesting them. As such inefficient and poor value for money year end spending should be avoided.

Banking and payments

The Trust uses Lloyds for its banking services. Every school completes a weekly payment run to suppliers on Fridays. This is signed off by the Principal prior to payment. Payment runs are paid from a central bank account. In addition, each school has its own local bank account. This is used for direct debits and payments from local authorities. Each school has its own Corporate Card, that acts as a debit card, in the name of the Principal, but held by the school's finance staff for those payments which will not work via a traditional invoice system.

Audit

The Trust is required to have our annual accounts externally audited each year. Individual schools will be supported to close their books in September to allow for review ahead of the audit starting in October. The additional work required at school level over a normal month end should be minimal. The central finance function will field most of the queries from auditors, but there will be some requirement to provide supporting evidence for any samples that the auditors take.

In addition the Trust is required under the Academies Trust Handbook to engage an independent organisation to carry out an internal audit function. Each year the internal auditors review financial controls. Once again the central finance function will field most of the queries, but the schools will need to provide supporting evidence. In addition the internal auditors agree with the Audit and Risk Committee on two additional areas, not necessarily finance related, to look at. These investigations may engage with a sample of schools as required. Any findings from the various audits are shared with schools, and any required changes to policies and procedures will be covered in training sessions.

Payroll and Pensions

Responsibility for payroll and pensions centrally is shared between Finance and HR. The Trust employs a Payroll Manager who reports into the Finance Director and who oversees the administration of the monthly payroll process in conjunction with the external payroll provider. Responsibility for inputting any payroll changes and checking the payroll before submission rests with the school. Support however is provided by central staff, finance or HR as appropriate, to ensure that all payments are made accurately. The Principal must approve payroll each month having reviewed a list of changes that month for accuracy and completeness.

The Payroll Manager also ensures the accurate submission of the year end pension audits (LGPS and TPS) and the clearance of any audit queries. School staff must log in monthly to the pension portals and action any issues raised by the schemes.

Central staff work with the external payroll provider to constantly improve efficiency of operations. From this year central staff will take on responsibility for entering all payroll data into the finance system, identifying and clearing issues on a monthly basis.

Procurement support

Procurement support for major procurement exercises at Trust level is provided by Simon Pink and Andy Kreppel. Details of procurement expectations may be found in the Trust's procurement policy

Mandated suppliers

The Trust have a number of key suppliers that all our schools use

- Systems- these are covered in more detail in the IT section
 - IRIS Financials- finance and budgeting systems
 - MHR- HR and Payroll system (Entrust from November 2025)
 - Google Education Plus- communication and workspace system
 - RM Unify- Identity management system
 - Arbor- MIS
 - Lightspeed- Filtering and Monitoring system
 - MyConcern- Safeguarding platform
 - Provision Map- SEND software to manage and track provision mapping
- Estates- RLB (surveyors, engineers and project managers for capital projects) and 3D Facilities Management for estates related statutory compliance
- IT central systems- RM for management of network infrastructure, Google, Lightspeed filtering and Microsoft Intune (for serverless schools)
- Broadband- RM
- Classroom audiovisual and Chromebooks- RM
- Banking services - Lloyds Bank

- Legal Services - Browne Jacobson
- SEN Tracking - Provision Map
- Utilities - Central contracts through our brokers Inspired (Bryt for electricity Corona for gas from October 2025)
- Water services - Central contract through our broker Expense Reduction Analysts (currently Water2Business)
- Insurance - RPA (with brokers procuring engineering, minibuss and occasional business use motoring insurance)
- External Audit - Bishop Fleming
- Internal Audit - Academy Advisory

Areas with preferred suppliers

- Kyocera- printers and multifunction devices
- ParentPay - Parental payment services
- Dolce - Catering (currently in almost half of schools, but we have several successful in house catering provisions as well)
- InVentry - Sign in and door access systems
- OFSM - Free school meal checking system

HR support

The Trust is the employer of all staff across all academies and this requires a degree of consistency of approach. However, the scheme of delegation provides Principals with the ability to make many staffing related decisions at a local level, working collaboratively with the central HR Team where appropriate.

Management of employee related matters

The Trust's central HR Team provides a regional HR Business Partner model of support, which enables us to work closely with Principals and Senior Leaders to manage staffing issues together. This is delivered through regular contact and support for reactive issues and through a monthly HR meeting with Principals and HR Leads in schools. This structured meeting provides an opportunity to share information and discuss staffing matters, including employee relations work, recruitment, learning and development needs etc.

Operational HR within schools

The Trust's central HR Team also provides support for staff leading operational HR within schools (HR Leads) and line managers. This includes support to manage safer recruitment, onboarding, employment contracts, payroll and pensions queries.

Designated email, telephone and in person administrative support is provided by central HR staff as needed. In addition, we hold a national meeting for all HR Leads on a monthly basis to provide topical updates and training.

HR system linked to payroll and pensions

The Trust's HR data is retained in iTrent and this links directly to the live payroll system and pensions returns. System input rests with the schools but central support is provided by the HR Team to train school based staff in use of the system, and is available to assist resolution of queries and issues.

There are strong links between the central finance and HR teams to ensure effective processes and support for schools across this area of work.

HR training

The central HR Team provides an annual schedule of HR related training aimed at supporting Principals, senior leaders and HR Leads to manage staffing matters. This includes accredited Safer Recruitment Training delivered by our inhouse qualified trainers.

HR reporting, including statutory reporting

The Trust provides regular reports to Principals and school based HR Leads to assist in the understanding of staffing demographics and to assist in the staff management. This includes a monthly sickness absence trigger report. Ad hoc reports can also be provided on request.

The Trust manages statutory reporting on behalf of schools including the ONS returns, Gender Pay Gap Report and Trade Union Facilities Time Report. Support is also provided to schools to complete the annual School Workforce Census.

Estates support

Ensuring that our schools are safe, compliant and stimulating learning environments is a collaboration between the central team, trusted external partners, school leaders and site managers.

Strategic capital planning

We work with a range of external bodies, including DfE and local authorities, to secure capital funding into the trust for investment in improving and, where applicable, expanding the school estate. We prepare a rolling three year Estates Strategy, setting out the approach and priorities for capital investment across all schools. We use periodic condition survey data, information from statutory compliance service reports and knowledge from regional surveyors to engage with each school to build a plan incorporating their own priorities and those improvements required to keep the school safe, open and compliant.

Technical support & compliance

Statutory servicing is carried out by a single provider (3D Facilities Management), giving consistency of approach and providing trustees and schools with greater assurance that our estate is legally compliant. 3D FM provides an emergency call out service 24 hours a day, 7 days a week.

All schools are provided with a compliance tracker, where site managers are asked to record specific weekly, monthly, termly and annual checks. This gives the Principal and the Trust assurance that important safety checks have been carried out as well as supports site managers in knowing what is required.

Surveyors and engineers are provided through a contract with RLB, who allocate a named surveyor to each of our three regions which ensures a close working relationship between the school and surveyor and facilitates a deeper understanding of the needs and aspirations of each school. The RLB surveyors provide technical services at a strategic level, to inform and deliver the estates strategy programmes of work, as well as work with schools supporting reactive maintenance and other school funded projects.

Each region is also supported by a Regional Estates Lead: an experienced site manager who is released from their own school one day per week to share their expertise and to support with compliance, through a termly visit to each school. This provides a fresh pair of eyes to review the site and building as well as to work alongside the site manager with programmed compliance checks such as asbestos, fire safety, etc.

Health and Safety

Health and Safety support and guidance in respect of policies, examples of best practice, training and oversight is provided centrally.

Health & Safety Procedures

As well as setting the Health and Safety Policy, the Trust provides an online library comprising a wealth of exemplar best practice documents. Schools are supported when arranging more “non routine” activities such as residential experiences or large events. Specific H&S training is brokered e.g. ensuring that all schools have at least one IOSH qualified staff member. Throughout the year, the Trust conducts a programme of theme based H&S audits at all schools, which is part of our plan for continuous improvement in this area.

RIDDOR

The Trust operates an accident and incident reporting and investigation process. Any significant accident is escalated to the central team for review and to consider whether

further investigation is needed and, where applicable, to deal with reporting to HSE under RIDDOR. We support schools to identify trends and to risk manage activities to continually reduce accidents where possible.

IT support

The Trust has a small central IT team (comprising Andy Kreppel and Pete Mason). Their role is: -

- Knowing the Trust's and its schools' IT estate and associated risks
- Developing and improving the Trust's IT estate in line with educational priorities
- Providing strategic technical advice to schools
- Supporting schools in budget planning and IT procurement
- Supporting and quality assuring school IT support and developing local capacity to support the same
- Problem solving and capacity build where the above is not achieving desired outcomes

Andy and Pete are supported by RM who are contracted to manage the Trust's Google tenancy, broadband connectivity, network infrastructure (switches and access points), and filtering on the Trust's behalf. RM are also the Trust's procurement partner for Chromebooks and classroom audiovisual- supporting the central team with the delivery of a rolling IT equipment refresh programme across all schools

IT infrastructure (broadband, switches, access points and wifi routers)

The Trust has a 5 year broadband contract in place with RM. This provides schools with a minimum speed of 200MB and also ensures all schools have a backup line in place for resilience. It is expected that all schools will be in this contract by September 2026.

All schools (bar five- Hollywood, Netherbrook, Valley, Peterbrook and Rowley Hall) have had their network infrastructure (switches and access points) upgraded within the last 5 years with the networks centrally managed by RM within the HPE Aruba console. This allows remote monitoring and security patching as well as the ability to manage issues remotely. Switches and access point upgrades have been centrally funded by the Trust.

Any issues with the quality of network coverage should be flagged with RM in the first instance, copying in Pete Mason and Andy Kreppel.

IT hardware (classroom screens & chromebooks)

The Trust's Central IT team have procured RM as a delivery partner for a rolling programme of Chromebook and classroom audiovisual refresh. Chromebooks will be replaced on a five year rolling cycle and boards on a seven year rolling cycle.

The Trust has a Google first strategy. Chromebooks have been selected as the preferred device for teaching staff, due to functionality, speed, safeguarding, longevity, cost and ease of management and support. TEFAT operates a Why Not Chrome policy and expects schools to move teachers to Chromebooks when classroom and teacher devices need replacing.

Serverless schools

The Trust is moving towards a Trust-wide serverless model with the majority of staff on Chromebooks and any remaining Windows devices able to be managed remotely through Intune. 22 schools are already operating without servers and with Windows devices being managed through Intune. It is expected that all schools will be operating without servers by September 2026.

The move to serverless delivers the following benefits to both the schools and the Trust: -

- It simplifies and makes more secure the Trust's infrastructure
- Moving to this model removes the cost of replacing servers every 5 years (£6-10k)
- It reduces the need for costly annual Microsoft licences.
- Security policies and updates can be consistently applied to reduce cyber risks
- It allows the Trust to better support IT issues centrally and help plan refresh of devices with schools
- It enables better visibility on IT assets in schools
- It decreases support costs in the medium-term

Photocopying & printing

The Trust has a preferred supplier agreement with Kyocera which runs until 2027. We also implement Papercut Hive as a print management solution as part of the move to serverless.

Filtering, monitoring & cyber security

The Trust's filtering and monitoring software is Lightspeed across all sites. Filtering is managed by RM on our behalf and monitoring is managed through the Trust's safeguarding teams

IT support

Support for Google, networks, broadband (and Windows devices in serverless schools) is managed through the Trust's central IT contract with RM. Schools have the ability to choose their own local on-site support for anything not covered by the central contract- although they must work closely with both the central team and RM. As schools move serverless we have seen the need for onsite IT support drop significantly.

Risk management support

Approach to risk management

Schools change dynamically from day to day, indeed it has often been said that every primary school is merely a long term sickness and a maternity leave away from crisis. This is why TEFAT takes a risk-based approach to supporting its schools. Put simply, we are much less interested in your current Ofsted judgement than we are in the multiple feedback mechanisms listed above in the section on governance. We RAG rate all schools in the round and these risk assessments are discussed with you in each Governance Review meeting. We do this because we believe that support to schools should be determined by current risk not by labels or historical reputations, which may be significantly out of date.

We ask school leaders to assess their own risk holistically every half term and these risk assessments are moderated by the Operations Group in line with our other feedback loops from pupils, parents and staff. Operations Group Directors also RAG rate every school from their own perspective (finance, HR, estates and compliance, IT and, of course, safeguarding and education) in line with our rubrics. Our risk rubrics are under continuous development and are regularly refined by our Workgroups and SIGs.

School risk assessment support

The TEFAT Risk Assessment Policy sets out the statutory and Trust requirements for risk assessments. We have a standard template layout as well as a growing library of exemplars to support schools in developing their own. Support for offsite trips and residentials is also provided.

When in doubt, contact Trish Martin in advance.

TEFAT regularly performs horizon scanning functions to identify specific and general public health risks relevant to schools and suggest steps to mitigate these. In addition we will repeat the approach taken during Covid of workshoping organisation-wide practice to ensure that this does not become too bureaucratic or removed from reality.

Critical incident support

Terrible things do happen occasionally in schools. When they do TEFAT will be there for you. It is however important for you to maintain your school-level critical incident plan and grab-bag.

Miscellaneous

Social media

Regrettably, social media has become ubiquitous. Whilst it is only human for a school leader to pretend it isn't there, social media will affect your school. TEFAT doesn't require its schools to maintain a social media presence. But, used well, a small selection of social media handles can be a more effective communication tool than the traditional, tedious school newsletter.

As a general rule, choose the platforms where your stakeholders can be found. This is an ever moving space and risks becoming obsolete quite quickly but at present the Trust operates [Facebook](#), [X \(Twitter\)](#) and [Instagram](#) accounts under the common handle **#ElliotSchools**.

In order for us to amplify your message but also to support you with engagement, please tag us in your messages.

The Trust employs a [Communications and Community Engagement Officer](#) who can offer advice and support in this area.

Quite often schools ask us how to deal with negative comments on social media by parents or small groups of parents. The best advice is to ignore it and focus on sharing positive messages showcasing the achievements of the school community. But there are instances where more specific support is required.

Press, PR and marketing

With the rise of social media and the collapse of local press and TV, many of the more traditional school media management approaches have become less fruitful. The Trust will always support its schools in the preparation of Press Releases on important or sensitive items, please contact the Communications and Community Engagement Officer for help with this. However it is often more productive to create a 2 minute video for social media than to spend hours drafting a pithy press release.

Sometimes schools are approached directly by the press and TV. Please discuss these approaches with your Regional Director or with the Trust CEO before responding or agreeing

to filming at your school. If you are being pestered for comment you can always refer the request to your Regional Director.

Community Box Programme and Community Partnership Hubs

In the winter of 2019-20 the Trust was looking to establish a Holiday Hunger Programme and began developing a partnership with Rackets Cubed, a sports charity, based in London. Initial plans were quickly overtaken by Covid events and we adjusted and launched our Community Box Programme in April 2020. This programme provides a weekly box of essential food, cleaning supplies and personal hygiene items to those most in need. By working with food surplus charities such as FareShare, City Harvest, the Felix Project, and In Kind Direct, we are able to provide an average family of four with up to 12 meals per week to a value of around £35 but at a net cost of only £3 per box.

This programme is now running in 23 of our schools, who between them give out over 800-900 boxes each week. To the end of September 2025 this flourishing partnership has issued over 120,000 boxes to our most vulnerable families, with a value exceeding £4m.

In addition to the obvious benefits of the relief of poverty and hunger, the scheme also improves trust and openness in the communities that our schools serve, which in turn has wider societal benefits. To that end we are trialling an expansion of the programme. Community Partnership Hubs will be safe community spaces on our school sites, where we employ a local coordinator to attract and signpost to other charities and support organisations. We will use the Community Box Programme as an anchor to bring the community into the space and from there offer and refer to additional support related to local need. This may take the form of adult literacy or EAL training, SEND support, debt relief advice, employability training, domestic violence or substance abuse support and counselling, indeed anything that is matched to the needs of the community.

Additional resources

[Elliot Foundation Community Site](#): this site opens whenever you log into RUnify and through it you should be able to access all of the microsites listed below. The site contains news and updates, lists of most of the groups operating across the Trust as well as the Trust calendar of events.

NB TEFAT Google Sites are a continuous work in progress so they do contain some slightly out of date areas/pages.

[Safeguarding site](#): a microsite maintained by the Safeguarding SIG with resources, training and support for all those working in safeguarding

[SEND site](#): a microsite maintained by Team Purple providing process explanations, legal frameworks and resources for SENDCOs and all working with SEND across the Trust

[HR site](#): to support Principals and Senior Leaders with all things HR

[Learning & Development site](#): shows all of the scheduled training programmes currently available and has a library of ondemand sessions [this offering is currently being reshaped]

[Apprenticeship site](#): list all the apprenticeships currently available in the Trust