

GDST ACADEMY TRUST

VALUE FOR MONEY STATEMENT 2013/14

Improving Educational Outcomes

- **Targeted Improvement**

Staffing structure is reviewed annually by the senior management teams. As a result of year on year reductions in funding, a continual balance has to be maintained between the need to recruit to support and improve/extend the curriculum whilst taking account of budget constraints. Through effective use of staff time, Belvedere Academy was able to cover staff absence at no cost. At 'A' level Birkenhead High School Academy (BHSA) reduced contact time from 10 to 9 periods per week without affecting the quality of teaching. Where student numbers were insufficient, some 'A' level subjects were dropped from the curriculum offer whilst small class groups were merged. Belvedere and BHSA were able to further increase sixth form numbers without any increase in staff costs.

Both academies' teaching and support staff have made extensive use of the Girls' Day School Trust's (GDST, the main sponsor) training courses which are offered free of charge. In addition, a significant amount of in-house staff development was carried out, with both schools running internal leadership courses and development programmes for newly qualified and recently qualified teachers.

- **Focus on Individual Pupils**

Both academies have broadened the curriculum offer to stretch the most able students and to meet the needs of an increasingly diverse cohort. Various curriculum pathways are offered at each key stage to prevent drop out and enable all students to achieve their full potential. BHSA has now introduced a vocational offer at Key Stage 5 in each of the five different curriculum areas.

Teaching and Learning was a key strand of each academy's development plan and a key objective was to ensure that all lessons have appropriate differentiation in place in order to meet the differing needs of pupils. Differentiation was a focus of Belvedere's senior management team's lesson observations and best practice was subsequently shared with staff at INSET training sessions.

The extensive after hours enrichment programmes at BHSA and Belvedere remain popular with pupils and extend learning beyond the curriculum whilst also contributing to improved outcomes. Both academies ran additional study programmes to support the examination year groups.

Closing the gap for Pupil Premium students was also a key objective and all staff are made aware of the Pupil Premium students and have access to tracking information. Interventions such as group and one to one support and nurture groups were put in place. Recent data indicates that these measures are proving effective in closing the attainment gap.

BHSA drew down additional counselling and youth worker support from Health Services in Schools to supplement the work of their Health and Well-being Mentor and Belvedere employs a counsellor for two days per week. Belvedere was also able to achieve savings by restructuring its Inclusion Team following the departure of the Inclusion Manager.

- **Collaboration**

Both academies continued to work collaboratively in several areas in order to share best practice, reduce costs and improve standards. During the year BHSA and Belvedere have worked jointly on data systems, driving outstanding teaching initiatives and negotiating insurance renewals. The Academy Trust also worked with its sponsor, the Girls' Day School Trust (GDST) to share best practice via the free of charge training courses mentioned above and in other areas such as health and safety, safeguarding and ICT developments. Our membership of the GDST family has also brought benefits for the students in terms of network activities – sport, music, master classes, leadership opportunities, alumni connections etc.

The academies maintain a close working relationship with other local schools via membership of the Liverpool/Wirral Association of Secondary Heads, the Wirral Primary Heads Cluster Group and the Liverpool School's Bursars Association, each of which provided opportunities for sharing best practice. Teaching staff at BHSA and Belvedere have taken part in the GDST's 'DROPP' programme which is aimed at driving outstanding teaching performance. Teachers have also been involved in various local authority networks, particularly in the specialism subjects of maths, music, modern foreign languages and science. BHSA has also worked closely with its neighbouring school, St Anselm's, on 'A' level provision.

- **Quantifying Improvements**

The academies report to local governors and trustees each term and provide information on pupils' educational attainment, attendance and behaviour. Academic attainment at all key stages was excellent and places the academies well above national average expectations.

- **Financial Governance and Oversight**

The Academy Trust has a robust system of financial governance and oversight. Each academy carried out an annual self assessment of its financial management and governance and this was reviewed by the trustees.

The academies each had a Finance Committee in operation during the year (see comments at the end of this section) and a Local Governing Body (LGB), with the LGBs reporting to the Academy Trust Board (ATB). There is also an Audit and Risk Committee which reports to the ATB. This committee has the formal role of oversight, assessment and review of the controls and procedures which management has put in place in order to ensure that the ATB and its academies are prudently and effectively managed and that financial and non-financial risks are identified and mitigated. In order to do this it reviews financial statements and internal controls, reviews procedures to demonstrate value for money and reviews both the internal and external audit processes.

The above committees met termly and reviewed the following information:-

- Pupil numbers forecasts
- In Year Income and Expenditure against budget and forecast
- Long term financial forecast
- 12 month rolling cash flow forecast
- Capital expenditure forecast

During the year, the trustees carried out a review of the governance and reporting arrangements in order to streamline the structure and reduce duplication of reporting. From 2014/15 the ATB Audit and Risk Committee and the Local Governing Bodies will deal with the work previously carried out by the Finance Committees. A Principal Finance Officer was appointed with effect from August 2014 and this should allow for further collaboration and opportunities to achieve value for money.

- **Managing Risks**

Risk registers are maintained for each academy and the Academy Trust Board maintains a strategic risk register. The risks to which the academies are exposed and the mitigating actions taken to reduce those risks were reviewed regularly by the Local Governing Bodies and the Academy Trust Board.

- **Purchasing and Procurement**

Through the use of its Scheme of Delegation, clearly defined approval limits, the procurement and tendering policy and use of preferred supplier lists, each academy aims to ensure that value for money is achieved for all expenditure. In 2013/14 tender exercises were carried out for BHSA's staff absence insurance and Belvedere's coach service and printing/ copying requirements. A joint tender was carried out for the academies' insurance renewal.

As mentioned in the 'collaboration' section above, both academies were well supported by our sponsor the GDST via the provision of free of charge support and advice. Were it not for this support each academy would undoubtedly incur additional expenditure from seeking the necessary advice from traded services of the Local Authority or private providers.

We also have formal service level agreements with the GDST to manage the payroll, and provide services for IT support and internal audit. The academies and the trustees are fully aware of the requirements regarding related party transactions. A benchmarking exercise was carried out in the year and the cost of the services compared favourably with external providers. The GDST also provided costing information to demonstrate that all services were delivered at less than cost.

Both academies achieve value for money by employing their own estates team staff to carry out minor repairs and works. BHSA has taken advantage of natural wastage in its support staff to replace at lower salary levels and also appointed an apprentice to the finance department. Teaching staff leavers were replaced by newly qualified teachers in most cases and the senior leadership team was maintained at a lean level in order to fund teaching and support staff posts. The Community Service Initiative saw sixth form students peer working with younger students in the junior and senior schools.

Belvedere's £0.5 million Academies' Capital Maintenance Fund project was completed in June 2013. The works included a new dining room extension and improved Sixth Form facilities. Catering income saw an increase of £21,000 compared with the previous year and this was in part due to the new dining facilities which have made the lunchtime offer much more attractive to pupils. Sixth Form students were employed to staff the additional till points which were installed to alleviate queuing. The new sixth form common room and study areas also contributed to sixth form recruitment with the academy attracting over 30 external students

- **Maximising External Income**

BHSA students and staff are now benefiting from the £12 million refurbishment which reached practical completion in December 2012. Now that the new facilities are fully

available, the academy was able to generate £105,000 in lettings income compared with £87,000 in 2012/13. The premises have been used by community groups, sports clubs, choirs, drama groups etc. The academy also employs a part time fundraiser who was able to secure funding from a number of sources which along with funds from the academy's very active Parents' Association were able to support various initiatives and provide equipment for several teaching departments.

Belvedere's Parental Contribution Scheme continued to be well supported by parents and generated £7,200 in the year. Contributions are expected to increase year on year, rising to £20,000 per annum as the scheme is extended to all cohorts. Other external income for the amounted to £50,700. The academy's coach service also performed better than budget due to a strong marketing campaign and a competitive contract price following a tender exercise.

- **Review of Operations to Maximise Resources**

As accounting officers, we are continually aware of the need to ensure that the Academy Trust delivers value for money in its use of public funds. Throughout the year, via our procurement processes, review of the academies' development plans, the self assessment exercise and the review of financial management information, we have looked to see what we might learn from strategies and decisions made in order to make the budget go further in future. Several examples which illustrate this are detailed below.

After experiencing high costs to cover maternity leaves and a small number but high cost long term absences, BHSA carried out a tender exercise in 2013/14 for staff absence insurance cover which it believes will prove cost effective in 2014/15.

Belvedere installed a number of multi- functional printing/copying devices in 2013/14 but the anticipated cost savings expected have not materialised and various alterations to the printing policy are being implemented.

One of the key concerns for Belvedere is the lack of capital funding to replace the ICT equipment as it falls due for renewal. The academy is in the process of reviewing its ICT strategy in order to find more cost effective ways of operating. Due to the age of the current ICT equipment, the ICT technicians require extra support as a significant amount of their time was spent in repairing faulty equipment or implementing measures to extend equipment life. The decision was made to recruit an apprentice to support the technicians and this post will be filled for the start of 2014/15.