

The White Hills Park Trust
A Culture of Excellence

HANDBOOK FOR ACADEMIES

2020/2021



Introduction

Thank you for taking the time to find out more about the White Hills Park Trust. It has been my privilege to lead the Trust since 2014. In that time we have seen many changes, but the essential character of our Trust has endured.

Our ethos is based on a strong and consistent set of values, which we live in our academies every day. Central to these are two themes – firstly, we want the very best for every child including all aspects of their development – academically, emotionally, culturally, physically so that they leave us with their lives enriched and able to succeed. Secondly, we behave in an ethical and transparent way that benefits our academies, but also our local community and the system as a whole.

At the heart of our Trust are our pupils. We want their time in our academies to be a time of discovery and excitement, a time of life-changing opportunities and life-enhancing experiences. We want them to realise their ambition to become scientists, musicians, athletes, engineers, teachers, farmers, police officers – wherever their ambition leads them. Most of all we want them to be positive, productive, kind and generous members of their community, and that is the type of society we model in our academies.

We also want our academies to be great places to work, where our staff are given support and opportunities to develop, where collaboration is the natural way of working, and where we become stronger through working together. We are conscious of all our responsibilities as educators and public servants, including financial prudence and excellent community relationships.

We believe we have much to offer and much to learn, and it is in this spirit that we engage with others. I hope you enjoy discovering more about the White Hills Park Trust.

Dr Paul Heery – Chief Executive Officer



"We are a group of academies united in our mission to provide the very best opportunities for young people, with shared values, shared commitment to our locality and shared commitment to excellent outcomes."

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A. Our Vision and Values

A.1 Vision

The White Hills Park Trust (WHP) is a group of academies united in our mission to provide the very best opportunities for young people, with shared values, shared commitment to our locality and shared commitment to excellent outcomes.

Our Trust is built on strong values and a clear vision, demonstrated in our practice:

- Our students follow a broad, balanced and inspiring **curriculum**, both in timetabled lessons and beyond, which prepares them well for life beyond school.
- Our academies are rooted in their local **community**, and make a positive contribution to their locality.
- Our academies deliver high standards of **achievement**, reflected in students' excellent outcomes.
- The young people in our schools learn how to become positive **citizens**, with an understanding of the world around them, and a desire to bring about change for the better.
- Our academies and Trust work in open and generous **collaboration** with others, for the benefit of the wider system.
- Our academies are great places to work, where **staff** are valued and supported.
- High-quality, research-informed **professional development** is at the heart of our academy improvement strategy.
- We are committed to **open, transparent and ethical** systems of finance, leadership and management. We act in accordance with the Framework for Ethical Leadership in Education.

An expanded Trust has the potential to provide benefits in a range of areas, by:

- Bringing about continual academy improvement
- Making the most of our resources
- Running our academies with maximum efficiency
- Developing our workforce
- Providing opportunities for pupils
- Becoming a force for good in our community
- Establishing effective governance and leadership

"The role of the Trust is to empower our schools and support them by unlocking the benefits of working together."

A.2 Ethical Framework

The White Hills Park Trust is a Pathfinder for THE FRAMEWORK FOR ETHICAL LEADERSHIP IN EDUCATION. We expect all leaders in our Trust to embody these values in their daily work.

Selflessness

School and college leaders should act solely in the interest of children and young people.

Integrity

School and college leaders must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. Before acting and taking decisions, they must declare and resolve openly any perceived conflict of interest and relationships.

Objectivity

School and college leaders must act and take decisions impartially and fairly, using the best evidence and without discrimination or bias. Leaders should be dispassionate, exercising judgement and analysis for the good of children and young people.

Accountability

School and college leaders are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.

Openness

School and college leaders should expect to act and take decisions in an open and transparent manner. Information should not be withheld from scrutiny unless there are clear and lawful reasons for so doing.

Honesty

School and college leaders should be truthful.

Leadership

School and college leaders should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles, and be willing to challenge poor behaviour wherever it occurs. Leaders include both those who are paid to lead schools and colleges and those who volunteer to govern them. Schools and colleges serve children and young people and help them grow into fulfilled and valued citizens. As role models for the young, how we behave as leaders is as important as what we do. Leaders should show Leadership through the following personal characteristics or virtues:

Trust | leaders are trustworthy and reliable. We hold trust on behalf of children and should be beyond reproach. We are honest about our motivations.

Wisdom | leaders use experience, knowledge and insight. We demonstrate moderation and self-awareness. We act calmly and rationally. We serve our schools and colleges with propriety and good sense.

Kindness | leaders demonstrate respect, generosity of spirit, understanding and good temper. We give difficult messages humanely where conflict is unavoidable.

Justice | leaders are fair and work for the good of all children. We seek to enable all young people to lead useful, happy and fulfilling lives.

Service | leaders are conscientious and dutiful. We demonstrate humility and self-control, supporting the structures, conventions and rules which safeguard quality. Our actions protect high-quality education.

Courage | leaders work courageously in the best interests of children and young people. We protect their safety and their right to a broad, effective and creative education. We hold one another to account courageously.

Optimism | leaders are positive and encouraging. Despite difficulties and pressures, we are developing excellent education to change the world for the better.

(Taken from the Chartered College of Teaching Ethical Leadership Commission: Framework for Ethical Leadership in Education, Jan 2019)

B. Governance

B.1 Structure



B.2 Our Members



Dr Heike Bartel is Associate Professor of German Studies at The University of Nottingham School of Cultures, Languages and Area Studies and a Fellow of the Nottingham Institute of Mental Health.

In her role as Associate Professor in German and Comparative Studies in the Dept. of Modern Languages and Cultures, Dr Bartel has been engaged in work with local and regional schools (primary and secondary) since 2005. In addition to being passionate about modern foreign languages (having led many collaborations with school about studying languages in particular and humanities subjects in general), she has a keen interest in mental health and leads an interdisciplinary project on mental health, body image and eating disorders with particular focus on revising gendered and ethnic stereotypes about eating disorders and mental health. She trains teachers and HEI staff and works with authors, artists and local charity partner First Steps Eating Disorders. She 'looks after' a high number of first year undergraduate students and is particularly keen to address issues linked to the transition from schools/colleges to Higher Education.



Professor Stan Heptinstall MBE is an Emeritus Professor of the University of Nottingham and a former local government councillor on Broxtowe Borough Council and Nottinghamshire County Council.

Until his retirement in 2011 he was Professor of Thrombosis and Haemostasis at the University of Nottingham where he finished his active career as an academic member of staff. Professor Heptinstall served as Head of the Division of Cardiovascular Medicine in the School of Clinical Sciences, Faculty of Medicine and Health Sciences. He was head of the Thrombosis and Haemostasis Research Group based in the Queen's Medical Centre, Nottingham for many years.

He was a local government councillor for 26 years, serving on Broxtowe Borough Council and Nottinghamshire County Council. He retired as a borough councillor in 2015 having served as the Mayor of the Borough of Broxtowe in the year 2014/15. He is a leading member of the Bramcote and Stapleford Golden Jubilee Group that organises the Hemlock Happening, which annually attracts approximately 10,000 people to Bramcote Hills Park for a day of festivities and leisure. For many years he was the chair of the Bramcote Community Action Team. He is a trustee of several local charities including Beeston Shopmobility and is also a churchwarden at his local parish church, St Michael's Church. In 2015, he became a Trustee of SW Notts District Scout Council and in 2016 was appointed Chair of the Board of Trustees. In 1997, Professor Heptinstall was made a Member of the Order of the British Empire (MBE) by Queen Elizabeth II in recognition of his extensive community activities. The citation was: "for services to the people of Bramcote in the county of Nottinghamshire". In 2018 he was made an Alderman of the Borough of Broxtowe.

Stan was a governor and Director of the White Hills Park Trust, until he stepped down in 2016.



Adam Bird is a technology entrepreneur who has successfully built and grown two international businesses.

He has been a Beeston resident since attending the University of Nottingham in the mid-nineties. Both of his children attended Alderman White School and he has been part of the governing body of the White Hills Park Trust since 2013.

He is a passionate believer in the role of inclusive education in forming and inspiring young people.

B.3 Our Trustees



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Ruth Brittle is a lecturer in law at Nottingham Trent University. She completed her doctoral research in children's rights and refugee law in July 2019 at the University of Nottingham. She has lived in Beeston for a number of years. Ruth has been a Governor, Trustee and Director of the White Hills Park Trust since 2012. Both of her children attended Alderman White School where she was Chair of Governors. Ruth is committed to the Trust ethos to provide good, inclusive, broad and balanced education to all children in the local community.



Stuart Baird has lived in Beeston for over 20 years and currently has two children at Alderman White School, while his eldest has already completed a highly successful time at the school.

A former journalist, Stuart has worked in the media and public relations profession, most notably as a Government communications director for 12 years and a director of communications, engagement and marketing for the NHS both in England and Scotland. He managed hundreds of Ministerial and Royal Family events throughout his time in Government, and was published in 2018 as part of 'Platinum' a book celebrating the Chartered Institute of Public Relations' 70th Anniversary. Stuart set up his own PR agency (BakerBaird Communications) in 2015 which has produced award winning work for clients including the University of Liverpool, NHS Education for Scotland and a House of Lords Commission. He was named the CIPR's independent practitioner of the year in 2016.



Kirsten Rawson is married and has two daughters. Her eldest daughter is a pupil at Bramcote College. Kirsten is currently working for Defra but previously worked for the DfE on the Priority Schools Building Programme. This required managing many projects at a time, undertaking the role of the client and ensuring client requirements were delivered. She was involved from feasibility stage right through to sign-off of the building; skills that are proving useful in the Bramcote College project. Having managed people for a number of years, Kirsten has experience in interviewing, day to day management, restructure, dealing with HR issues and all the other challenges and opportunities that these types of role bring. Other experience includes managing buildings, contract management, stakeholder liaison, introduction of policies and procedures to name a few. Kirsten is a Governor at Bramcote Hills Primary School. Prior to being a school Governor, Kirsten had been involved in Scouting for over 20 years. Helping young people to reach their potential is something about which she is passionate.



Helen Nankervis lives with her husband and two daughters in Bramcote and had previously lived in Beeston since 2001. Both of her daughters attend Alderman White School. She has over a decade of experience as a health researcher; analysing and interpreting data from clinical trials. She has assessed data for risk of bias and used and developed methods which identify the levels of benefit and harm when pooling large quantities of quantitative data. She has editing and communications skills from her experience as an editorial manager for a scientific journal; authoring and presenting research papers; and creating information about research projects for patients and the public. Helen has also designed and run STEM activities and presentations. She currently work as an improvement lead in a large Engineering company; involving project managing, facilitating and coaching. She values managing and building the relationships essential for success as highly as the need for high quality data and information to drive decision making.



Neil Boulter has lived in and around Nottingham for many years and spends his time between work at Experian (a long career in Information Security), and his family. He is keen to support the local community and provide the best opportunities for his children and others in the local education system.

Neil has spent many years in Security but has also done a lot of work in Risk, both operational and Strategic and spent some time managing Business Continuity for large organisations globally. All of these roles are fundamentally a pragmatic assessment of the level of risk deemed acceptable, versus the amount of money needed to reduce that risk to an acceptable level.



Sue Vasey has over 30 years of experience in Education and is currently a Senior School Improvement Officer in a large multi-academy trust. She has substantial teaching and leadership experience across a variety of secondary settings and has worked as a teaching and learning consultant supporting school improvement in the primary and secondary phases. Sue has also led a school improvement team within a Local Authority and as such has vast experience of working with schools in a variety of contexts but specifically in challenging circumstances and those with high levels of deprivation. Sue also has substantial experience of leading school inspections in both primary and secondary phases. Sue is currently Vice Chair of the Trust and prior to this has experience of governance in both a primary and secondary school.

B.4 Scheme of Delegation

The White Hills Park Trust (WHP) will operate in line with the following principles:

The Trust is governed by the Trust Board and will:

1. Ensure clarity of vision, ethos and set the strategic direction of the Trust.
2. Hold Executive leaders, Local Governing Bodies (LGBs) and academies to account to ensure the highest quality educational provision, safeguarding and equality of opportunity for all its pupils and effective support and performance management of staff.
3. Ensure effective financial performance by implementing a robust scheme of delegation.
4. Consult LGBs on proposals for membership, structure, terms of reference for LGBs and sub-committees; on arrangements for the recruitment and appointment of governors; and the introduction of the Trust's multi-academy governance arrangements before decisions are made.
5. Take appropriate action, including full or partial withdrawal of delegated authorities to individuals, groups and LGBs should the individual, group, or LGB fail to carry out their duties and responsibilities effectively in line with the Scheme of Delegation.
6. Operate in partnership and support LGBs and academies to improve outcomes: the Trust will consult over arrangements that directly affect LGBs and individual academies.
7. Implement effective arrangements for monitoring and evaluating the performance of LGBs and academies.

Academies in the Trust will:

1. Act in accordance with the Trust Board scheme of delegation and make decisions on the strategic and tactical direction and policies affecting the day to day operation of the academy.
2. Report regularly to the Trust Board on the quality of educational provision, safeguarding and equality of opportunity for all its pupils and effective support and performance management of staff.

Purpose of the Scheme of Delegation:

- Ensure that those responsible for governance and leadership are clear about which decisions remain in the control of the Trust Board
- Ensure that the role of the executive leadership is fully understood throughout the Trust
- Promote a culture of honesty and accountability
- Identify responsibility for the appointment and performance management of the Chief Executive Officer and academy Head Teachers
- Identify responsibility for policy and practice in each academy
- Identify responsibility for oversight of each academy's budget
- Identify responsibility for assessment of risk in each academy
- Identify responsibility for oversight of educational performance in each academy

ROLES AND RESPONSIBILITIES

MEMBERS

As charitable companies limited by guarantee, the members have a similar role to the shareholders of a company. The role of Members and Trustees are separate in order to achieve robust accountability. Members are the subscribers to the Trusts memorandum of association (MA) and have ultimate control over the multi-academy trust, with the ability to:

- Amend the Articles of Association (AA's), subject to restrictions in the articles, funding agreement or charity laws
- Appoint/remove/suspend existing Members
- Appoint/remove/suspend existing Trustees
- By special resolution, issue direction to Trustees to take a specific action which may have implications for the LGBs
- Appoint the Trusts external auditors and receive/approve the financial statement and annual report.
- Change the name of the company and ultimately wind up the Academy Trust

TRUSTEES

The Trustees are both charity trustees and company directors. Academy Trusts are charitable companies and the trustees must comply with company law requirements. The duties are largely the same as those of a governor of a maintained school, such as regularly attending meetings, managing conflicts of interest, seeking advice from the academy's leadership team and ensuring the academy has appropriate procedures in place for reporting financial information.

Trustees have responsibility for 3 core governance functions:

- ensuring clarity of visions, ethos and setting the strategic direction,
- holding executive leaders to account for the educational performance of the organisation and its pupils and the performance management of staff
- ensuring effective financial performance

The Trustees set the strategic direction of the Trust by having the following accountability:

- Set the vision, values, aims and objectives for the Trust
- Agree the policy framework for LGBs to implement to achieve those aims and objectives
- Appoint/remove/suspend existing Governors of the LGB
- Review the Trust scheme of delegation arrangements annually
- Elect a chair, vice chairs and any other officers of the Trust

Trustees provide challenge and support by monitoring, reviewing and evaluating:

- LGB and academy progress towards the Trust annual priorities as detailed in the strategic plan
- The effectiveness of the Trust in relation to external benchmarks
- The implementation and effectiveness of the policy framework by the LGB and academy
- The extent to which statutory duties have been met by the LGBs and academy

Trustees ensure accountability by:

- Ratifying the annual evaluation of academy effectiveness through scrutiny of QA evidence / KPIs
- Holding the Chief Executive Officer to account for the performance of the academies within the Trust including finance and the achievement of students
- Responding to OFSTED and other commissioned reports where necessary
- Establishing the framework through which parents and students are involved, consulted and informed
- Making available information to the community

TRUST BOARD

Trustees are appointed based on the skills set required to govern and reviewed through regular audit. Key skills include leadership, pedagogy, finance, commercial, business, HR, curriculum, communication, digital, legal and strategy.

In addition, all Trustees demonstrate the following skills and attributes:

- Maintain a constant focus on what's best for the Trust, academies, pupils and staff by challenging in a constructive manner, asking probing questions and ensuring alignment to the strategic picture, in terms of both the Trust and the academies within it.
- Understand and effectively carry out their roles, responsibilities and accountabilities, with the ability to consider dynamic and innovative options.
- Understand the financial and the business elements of leading a Trust, as well as the legal aspects of the role and how the Trust and the business work.
- Work as part of a team and accept shared responsibility and accountability, as well as undertaking frequent self-evaluation in order to remain effective.
- Act with a strong moral purpose, integrity and honesty, and as an advocate for the Trust's values, ethos and philosophy.
- See and make the most of opportunities that are outside the day-to-day practices of the Trust or academy.
- Be innovative, creative and open-minded by engaging in futures thinking.
- Interpret data and monitor performance expertly
- Trustees will act in accordance with the agreed Code of Conduct at all times

TRUST AUDIT AND RISK COMMITTEE

The Audit and Risk Committee is a sub-committee of the Trust Board, comprising a minimum of three members, appointed annually by the Trust Board. The role of the committee is to support the work of the Board by considering in greater detail items related to the management of strategic risk and the financial operation of the Trust and making recommendations to the Board. Duties of the committee include:

- Formulating / review of Trust and academy budgets
- Review of Trust Accounts
- Review Risk Register
- Determining the Trust Financial Model and policy
- Ensuring financial compliance
- Overseeing buildings maintenance and construction plan
- Monitoring Health and Safety

N.B. There is a separate Scheme of Delegation which sets out the relationship between the Trust Board and the Audit and Risk Committee.

GOVERNORS – THE LOCAL GOVERNING BODY (LGB)

Individuals who sit on a LGB are referred to as Governors, since Trustees delegate governance functions to the local level.

The LGB must meet and report to the Trust at least 3 times a year to assure that there is the highest quality education provision, safeguarding and equality of opportunity for all its pupils and effective support and performance management of staff.

Through formal reviews the LGB would be expected to robustly consider areas such as; quality of leadership; teaching, learning and assessment; culture and ethos; educational outcomes, standards and progress; quality of the curriculum offer; recruitment and retention levels of students and teachers and behaviour and welfare.

The LGB considers:

- The academy Head Teacher's Report – self-evaluation against current OFSTED criteria and any other criteria set by the LGB or the Trust
- Impact of key actions undertaken from the Academy Improvement Plan
- Monitoring activities undertaken by the academy and Governors
- Local and contextualised issues
- Recommendations to/direction from the Trust Board

Membership

The Trust expects the LGB to represent the community it serves and, as well as the skills set, the LGB is expected to demonstrate that it has actively sought to create a diverse membership that includes:

- Chair
- Vice
- Head Teacher of the academy
- At least 2 staff members
- At least 2 parents
- Any other number as required by the LGB

CHIEF EXECUTIVE OFFICER (CEO)

The Trust Board delegates responsibility for delivery of the vision and strategy to the CEO. The Trust Board will hold the CEO to account for the performance of the trust, including performance of the academies within the trust. The CEO in turn holds other senior executives to account by line managing them.

The CEO has the delegated responsibility for the operation of the trust including the performance of Trust academies and so the CEO performance manages the Academy Head Teachers. As there is delegation to the LGB this usually takes place alongside the LGB chair.

The CEO is the accounting officer so has overall responsibility for the operation of the Trust's financial responsibilities and must ensure that the organisation is run with financial effectiveness and stability, avoiding waste and securing value for money.

The CEO leads the executive management team of the academy trust. The CEO will delegate executive management functions to the executive management team and is accountable to the Trust Board for the performance of the executive management team.

ACADEMY HEAD TEACHER

The Academy Head Teacher is responsible for the management of the academy and is managed by the CEO but reports to the LGB on matters which have been delegated to the LGB.

ACADEMY COMMITTEE

The Academy Committee is an advisory body that provides the link between the Trust Board and the LGB. Membership comprises a representative of the Trust Board (usually the Chair), a representative of each Academy LGB (usually the Chair), the CEO and the Operations Director. Other members of the Trust Executive Team attend committee meetings in an advisory role as and when required.

TRUST STRATEGIC LEADERS

Senior Leaders from the Trust Executive consider medium and long term strategy and make recommendations to the Trust Board. The group evaluates the work of the Trust Team and the model of support and challenge provided to schools. This group provides strategic direction to the Trust Executive Team. It also makes recommendations for the Trust growth strategy.

ACADEMY LEADERS

All Head Teachers meet regularly with Trust Executive Leaders to discuss and review operational issues and Trust School Improvement support. This is the key communication forum for Head Teachers and senior leaders across the Trust.

SCHEME OF DELEGATION MATRIX

The following matrix is based on the legal documents that inform the management and running of the Trust namely:

- The Articles of Association of the Trust
- The Master Funding Agreement
- Supplementary Funding Agreements relative to each Academy
- The Academy Financial Handbook
- Scheme of Delegation
- Advice and guidance of the DfE and/or the ESFA

KEY

R	RESPONSIBLE	The person / group who actually carries out the process or task assignment; responsible for getting the job done
A	ACCOUNTABLE	The person / group ultimately accountable for the process or task being completed appropriately; responsible person (s) are accountable to this group
C	CONSULTED	People who are not directly involved with carrying out the task, but are consulted and may contribute to the shaping
I	INFORMED	Those who receive information about the process or task, or need to stay informed

* Delegated wholly or in part to the Audit and Risk Committee. The Trust Board retains accountability.

** Delegated to a panel comprising a minimum of 3 members of either the Trust Board or the relevant academy's LGB. If not possible then Trustees or members of the LGB of any academy may complete the panel.

*** Delegated to the Pay Committee appointed by Trust Board.

TRUST / ACADEMY LINK

The Scheme of Delegation matrix depends upon effective and timely communication and liaison within and between the Trust and each academy, and identifies the lead responsibility for each duty. Roles are abbreviated as follows:

AC	Academy Committee	CEO	Chief Executive Officer
TOD	Trust Operations Director	TGM	Trust Governance Manager
TFM	Trust Finance Manager	THPE	Trust Head of Property and Estates
TA	Trust Accountant		

Governance	Members	Trust Board	Chief Executive Officer	Local Governing Body	Academy Head Teacher	Trust / Academy Link
Appoint new or remove existing Members.	A, R					
Amend the Articles of Association.	A, R					
Appoint/remove Trustees.	A, R					
Appointment of Governors – ensuring processes in place for appointment of governors (including ensuring that the Governors have the skills to run the Academies).		A	C	R	C	AC
Appointment of Trust external auditors.	A		R			
Appointment of Trust internal auditors.		A*	R			
Appointment of Trust Board Company Secretary.		A*	R			
Appointment of Clerk to Local Governing Board.		I	R	C	I	TGM
Appointment of Chairs of LGB.		A		R	I	AC
Prepare scheme of delegation for LGBs.		A/R	C	I	I	AC
Implement training programme for Trustees and LGBs.		A	R	I	I	TGM

Educational Effectiveness	Members	Trust Board	Chief Executive Officer	Local Governing Body	Academy Head Teacher	Trust / Academy Link
Ensuring appropriate levels of support, challenge and intervention to support delivery of education outcomes.		A	R	C	C	CEO
Establishing Trust Curriculum Policy.		A	R	C	C	AC
Reviewing and challenging the value for money of the use of Pupil Premium and other dedicated funding.		C	C	A	R	CEO
Setting term dates and length of the academy day.		A	R	C	C	AC
Ensure school lunch is provided to appropriate nutritional standards.				A	R	TOD
Ensure provision of free school meals to those meeting criteria.				A	R	TOD
Agreeing formal collaborations and partnership.	I	A	R	C	C	AC
To hear pupil exclusions representations and determine outcome.		R**		R		CEO
To annually review the Behaviour Policy and Anti-Bullying Policy and use the exclusion data in comparison with local and national data.				A	R	
To appoint a Clerk to the Disciplinary Committee (who is not a Member, Trustee, Governor or the Chief Executive Officer).		I	R			

Finance, operations and asset management	Members	Trust Board	Chief Executive Officer	Local Governing Body	Academy Head Teacher	Trust / Academy Link
Determining and allocating the central services provided to the Academies by the Trust.	I	A*	R	C	C	AC
Overseeing the effectiveness of services provided centrally by the Trust.		A*	R	C	C	AC
Determining use of Academies' premises and ensuring premises are adequately maintained.		A*	R	C	C	TOD
Determining Trust insurance arrangements.		A*	R			
Overseeing media and public relations activities.		I	A, R	C	C	TOD
Preparing Academy Prospectus and updating website.			I	A	R	TOD
Ensuring Academy websites meet statutory requirements.		A	R	I	I	TOD
Determining and overseeing the overall buildings replacement and maintenance schedule and plan.		A*	R	C	C	THPE
Agreeing Trust funding model including individual funding arrangements for Academies including scheme of delegation of financial authority.	I	A*	R	C	C	AC
Formulating and setting the 3- 5 year Trust budget	I	A*	R	C	I	AC
Formulating and setting Academy budgets.		I*	I	A	R	TFM / TA
Approval of Academy budgets.		A*	R			
Ensuring delivery of academy annual budgets (including managing Academy cash flow).		I*	I	A	R	TFM TA
Ensure preparation of statutory annual accounts.		A*	R			
Acquiring and disposing of Trust land.	C	A*	R	I	I	AC
Changing use and disposal of Assets.	C	A*	R	I	I	AC
Agreeing the investment policy in line with the Academies Financial Handbook.	C	A*	R			
Establishing Trust procurement policies.		A*	R	I	I	AC
Approval of borrowing.	C	A*	R			
Ensuring VAT compliance.		A*	R			
Compliance: Funding Agreement – comply with all obligations including the Master and Supplementary Funding Agreements and the Academies Financial Handbook.	A	A*	R			
Compliance: Regulatory – with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety).	A	A*	R			
Compliance: Financial Oversight - ensuring that there are appropriate financial controls so that there is regularity, probity and value for money in relation to the management of public funds.	C	A*	R			

Compliance – completing the register of business interests and put in place a procedure to deal with any conflicts of interest and connected party transactions.	I	A*	R			
Compliance – FOI requests and complaints.		A*	R	C	C	AC
Set Admissions Policy.	I	A	R	C	C	AC
Admission application decisions and appeals.		A	R	C	C	TOD

Strategy and Leadership	Members	Trust Board	Chief Executive Officer	Local Governing Body	Academy Head Teacher	Trust / Academy Link
Change the name of the company (Trust).	A, R					
Set vision and strategic objectives of the Trust.	C	A	R	C	C	AC
Implementation of strategic objectives of the Trust.		A	R	C	C	AC
Set and scrutinise the strategic objectives of the Academies.		C	C	A	R	AC
Implementation of strategic objectives of an individual Academy.		C	C	A	R	AC
Review and approval of policies (including level of delegation to academies).		A	R	C	C	AC
Manage response to legal claims.		A	R	I	I	TOD
Manage strategic risk register.	C	A*	R	I	I	TOD
Design and implement the Trust Improvement Plan.	I	A	R	C	C	AC
Design and implement Academy plan in line with strategic aims of the Trust (annual requirement).		I	I	A	R	CEO
Reviewing performance of the Trust.	I	A	R	I	I	AC
Reviewing performance of Academies and reporting to Trust.		I	I	A	R	CEO

Human Resources & Personnel	Members	Trust Board	Chief Executive Officer	Local Governing Body	Academy Head Teacher	Trust / Academy Link
To determine the staff complement				A	R	CEO
To determine and review academy staffing structure including any temporary appointments.				A	R	CEO
To review annually the appraisal and performance management policy.		A/R***	C	I	I	AC
To implement the appraisal and performance management policy.		A	I	I	R	CEO
To review annually the academy pay policy.		A/R***	C	I	I	AC
To monitor implementation of the pay policy.		A***	R	I	I	CEO
To manage the annual salary review for the Chief Executive Officer.		A/R***				
To manage the annual appraisal and salary review for the Academy Head Teacher.		A	I	R	R	CEO
To manage the annual salary review, including post- threshold progression for teachers.		A	I	R	R	CEO
To recruit the Chief Executive Officer.		A/R				
To recruit Trust staff.		A	R			
To recruit the Academy Head Teacher.		I	C	A/R		CEO
To recruit staff on the leadership spine.		I	C	A	R	CEO
To recruit all other academy staff.			C	A	R	CEO
To suspend/dismiss the Chief Executive Officer.		A/R				
To end the suspension of the Chief Executive Officer.		A/R				
To suspend/dismiss other staff.		A	R	C	C	CEO
To end the suspension of other staff.		A	R	C	C	CEO
To develop and systematically review policies relating to staffing matters and to make recommendations for adoption/amendment of these to the Board of Trustees. E.g. disciplinary/capability procedures/absence management.		A	R	C	C	AC
To hear appeals made by staff in relation to the above and to ensure that any hearing or appeal panels set up to consider staffing matters are properly convened.		R **		R		CEO
To determine dismissal payments/early retirement.		A	R	I	I	CEO
To agree and monitor a training strategy for teachers, support staff and directors.		I	R	I	C	CEO

C. Operating Model

C.1 Structure Overview

The White Hills Park Trust (WHP) is a small, locally-based Multi-Academy Trust. We are responsive to our community's distinctive needs and small enough for all academies to feel that they have a real stake in the Trust and a genuine voice in decision-making. The role of the Trust is to help the schools to perform as well as they possibly can, so that the children and young people who attend get the best start in life. The Trust is the servant of our academies, and our work allows academy leaders to devote their time and focus to the things that are important – providing provision of the highest quality.

Everything that our Trust does meets the following tests:

- Does this benefit our pupils and lead to improved outcomes?
- Does this support leaders in the effective management of their academies?
- Does this have a positive impact on our community?
- Does this meet the highest ethical standards, including a commitment to equality and transparency?
- Does this develop our staff?
- Are we using public funds responsibly and efficiently?

We work with a range of organisations, services and providers in order to obtain high quality expert advice and secure best value. Our work with schools is supported by strong and effective communication, support for governance and an ethos of collaboration. We act in accordance with the Trust Scheme of Delegation and Financial Model, as well as all of our statutory obligations.

C.2 Meet the Team

Dr Paul Heery is the Chief Executive Officer. He leads the Academy Improvement Strategy, and leads the Trust team.

Jacqueline Sainsbury is Director of Primary. She leads the Academy Improvement Strategy in our primary schools.

James Macdonald is the Trust Operations Director. He leads the Trust Operations team and oversees the expansion of the Trust.

Karen Sims is the Trust Operations Manager. She provides business support and advice to Trust leaders, Trustees and LGBs.

Julia Gibbs is the Trust Accountant. She produces all financial reporting to Trustees and manages all ESFA and other external financial reporting requirements.

Sandra Lightwing is the Trust Finance Manager. She manages the operational financial processes and budgets across the Trust.

Sue Angood is the Trust Senior HR Manager. She provides HR support and advice to Trust leaders, Trustees and LGBs.

Colin Strawbridge is the Trust Head of Property and Estates. He leads the Trust strategy on all matters relating to buildings and premises.

Paul Bedford is the Trust IT Services Manager. He leads the Trust IT team and manages the development and maintenance of IT across the Trust.

Sandie Wilson and **Catherine Hayes** are our Data Managers. They ensure that Headteachers and Local Governing Bodies have the necessary information to understand the performance of their academies.

Dan Goulding is the Trust Communications and Marketing Manager. He leads on Marketing activities and Communication strategies for the Trust, maintaining a positive public image and maximising engagement with our local communities.

C.3 Trust Services

C.3.1 Finance and Risk

Purpose

The Finance team ensures that academies can manage their budgets efficiently and effectively, enabling as much as possible goes into supporting teaching and learning.

The Finance Team has a statutory role in ensuring that academies maximise their funding. This comprises monitoring academies budgets including challenging and supporting academies in financial difficulties; monitoring the use of accumulated balances held by the academies and supporting the return of Consistent Financial Reports to the DfE/ EFSA. The Finance Team ensures the Trust complies with the Academies Financial Handbook.

Key Contacts

Sandra Lightwing	Trust Finance Manager	<i>sandra.lightwing@whptrust.org</i>
Julia Gibbs	Trust Accountant	<i>julia.gibbs@whptrust.org</i>

What we offer

The Trust's Finance Manager and Trust Accountant lead in the provision, coordination and management of financial services across the Trust, which includes:

- Regular meetings with those responsible for finance in our academies.
- A suite of Trust-wide financial policies and procedures.
- The development of the Trust's financial strategies.
- Provision of regular financial performance reports including management accounts and year end audited financial statements.
- Management of the internal audit function (carried out by external auditors) on behalf of the Board and the management of the external audit activity, including review & sign off of financial statements.
- Management of payroll.
- Business planning including framework and key assumptions.
- Finance monitoring and reporting to Board and local governing bodies.
- Management of the financial relationships with the EFSA including completion of mandatory reporting deliverables.

Management of Finance Systems including:

- Access Budget
- Access Accounting
- Bromcom Online Payments

Management of Bank Accounts:

- Cashflow management
- Statement reconciliation
- Online payments/orders

Payroll

- Determination of employment / self-employment status
 - Processing of ad-hoc payroll submissions

- Importing of payroll reports from current payroll supplier (NCC)
- Payment of Trust payovers
- Submission of monthly Pension Returns for the Teacher Pension Scheme
- Preparation of year end returns for LGPS and TPS, and administration of related audit sign off
- Monthly payroll reconciliations

Trial Balance

- Management of Recharge Schedules
- Management of internal journals
- Month end reports

Purchase Ledger

- Orders
- Invoices
- Statement Reviews
- Supplier Verification
- BACS/Cheque payments

Staff Ledger

- Petty cash reimbursements
- Mileage Claims
- Course Bookings

Sales Ledger

- Invoicing for services
- Lettings
- Banking of all income

Pupil Activities

- Bromcom Online Payments
- Maintain academy fund accounts
- Manage academy trips
- Manage music tuition/DoE schemes

Fixed Assets

- Maintain the Trust fixed asset register and ensure it is updated monthly for purchases and disposals
- Calculate the monthly depreciation charge
- Carry out periodic physical verification of fixed assets

Risk Management

- Securing sufficient insurance cover, and administration of any insurance claims
- Maintain the overall Trust strategic risk register and advise on local/operational risk management as required

Apprenticeship Levy

- Financial management of the Trust Apprenticeship Levy, enabling maximum opportunities open to all staff across the Trust

Other external reporting requirements

- Management of the process and produce the required documentation to meet obligations in respect of Gender Pay Gap reporting, Payment Practices reporting, returns on meeting the Apprenticeship target and any other such reporting which becomes applicable for the Trust or academy.

C.3.2 Human Resources

Purpose

The HR Team ensure that our employment practices support staff and the smooth and efficient operation of our academies and conform to the highest ethical standards. We are responsible for organisation and management of all aspects of the Trust's Human Resources function and fulfilling the requirements of safer recruitment legislation. The team ensures the effective operation of systems and policies within the Trust and the development of its Human Resources service, ensuring compliance with employment law and appropriate education legislation. We assist with and oversee the recruitment, selection and retention process. We provide a bespoke HR Service offer to academies on behalf of the Trust, ensuring academies receive best value and a high standard of service delivery.

Key Contacts

Sue Angood	Trust Senior HR Manager	<i>sue.angood@whptrust.org</i>
Karen Sims	Trust Operations Manager	<i>karen.sims@whptrust.org</i>

What we offer

The Trust Senior HR Manager leads in the provision, co-ordination and management of Human Resources across the Trust, which includes:

Strategic HR management services

- TUPE consultation and support to ensure the smooth transition of new academies joining the Trust.
- Additional HR support and introductory meeting for new Head Teachers joining the Trust.
- Comprehensive advice to Head Teachers and LGB's regarding all employee relations matters including restructures, reorganisations, redundancy, performance, discipline and grievance.
- Monitoring of staff absence, provision of management information and advice on strategic action.
- Advisory support to Head Teachers and LGB's regarding the management of complex casework, including investigations and on-site support at formal hearings and appeals. Professional support to produce subsequent documentation, e.g. letters confirming decisions taken at formal meetings/hearings and appeals.
- Conciliation and mediation advice and services to support HR processes.
- Management of national HR-related requirements, for example gender pay gap reporting and public sector equality duty.
- Act as a critical friend and sounding board to all Head Teachers and LGB's on all HR matters.

Training

- Bespoke training on HR processes tailored to the requirements of your management team and LGB.
- Provision of centrally-organised training for staff and governors on key topics, for example new policies and safer recruitment.

Recruitment

- Lead on recruitment for Head Teacher vacancies.
- Provide 'arms-length' support of all other recruitment.

General

- Advice on all terms and conditions of teaching and support staff.
- Pension administration.

C.3.3 IT Services

Purpose

IT forms an integral part of a school's infrastructure – academies require fast, reliable and cost-effective IT support which supports teaching and learning. However, technology is fast-moving, constantly evolving and can be very complex.

WHP offers a range of support in this area, from the development of IT policies and procedures for staff and students, to wholesale implementation of IT systems and organisational IT strategies. With a vast network of contacts in the IT education sector, our team keeps up to date with changes in technology to ensure the aspirational needs of education leaders are met, whilst maintaining value for money.

Key Contacts

Paul Bedford Trust IT Services Manager *paul.bedford@whptrust.org*

What we offer

The Trust IT Services Manager leads in this area which includes:

Remote and onsite support – Provision of an onsite IT Technician for a minimum of half a day per week to assist with the installation and maintenance of IT estate. Academies also have access to remote support from the Trust IT Team that connect with the academy following an email or phone call to the IT Helpdesk.

In the event of a serious failure support is on-site in no more than 4 hours (during the school day).

Project management and development of IT systems - advice, support and guidance on the procurement and provision of new hardware such as laptops, desktop PCs, tablets and servers. Opportunities to benefit from the Trust's bulk buying power when the Trust and academies buy together.

Advice and guidance for development of IT strategies

Strategic planning and audit services.

Software support and maintenance - Software procurement, installation and maintenance. Anti-virus support and security patches to keep systems secure.

Telecoms and Communications - offering cost saving and effective strategies for each academy, helping to deliver a 21st century solution to keep all stakeholders in the loop. Full support and provision, from using VoIP technology for telephony systems to school apps and text messaging systems.

School Information Management System - advice, support and oversight of the Trust's MIS. Guidance on statutory data collection, reports and best practice when using the software. Support for induction training of staff on the MIS system. Advice and support on recording of Post-16 and Pupil Premium information to ensure accurate reporting for funding purposes.

Safeguarding Systems and Monitoring – helping ensure pupils are secure from the dangers of the internet, social media and apps. Automated reporting, keyword detection with real-time email alerts.

Data Protection - a key area as the education sector manages significant amounts of personal information. The Trust provides advice, conducts audits and carries out training in this area.

Staff Training - Training staff on Microsoft Office, and other popular software packages, in addition to the training included above.

C.3.4 Communications and Marketing

Purpose

The purpose of this service is to lead communication and marketing activities for the Trust and associated academies, to maintain clear and engaging online identities through use of social media and websites, to allow effective and positive parental communication, and to maximise engagement within our local communities through the use of positive news and promotional materials (for example prospectuses, banners, posters, newsletter, social media, etc).

Key Contacts

Dan Goulding Trust Communications & Marketing Manager *dan.goulding@whptrust.org*

What we offer

Our Trust Communications and Marketing Manager leads on this area which encompasses:

Communications

- Development of a central communications strategy for the Trust, ensuring all communications reflect consistently high standards and maintain the correct academy or Trust branding where appropriate.
- Working with academy administration teams to ensure regular and effective communication between parents and academies, to help academies promote themselves, share news, and keep people informed.
- Working with academies in conjunction with local and online media when necessary to manage news coverage, comments and promotion.
- Ensuring an effective strategy is in place to contact parents and staff in case of an emergency school closure.

Online Presence

- Management of the Trust and individual academies' websites, working with academies to ensure published content is up to date, relevant, engaging, and that statutory requirements are being met in line with current government guidance.
- Monitoring or management of social media accounts as requested (Facebook / Twitter / Instagram) and promotion of a positive and consistent image of the Trust and all its academies through these channels.

Engagement

- Increasing academies' engagement with parents and the local community through relevant social media channels.
- Promoting events, responding to online comments, and ensuring significant information (such as upcoming calendar events / important dates) is quick and easy to find.

Design and Marketing

- Design and production of promotional and marketing materials as requested, including (for example) prospectuses, posters, brochures, advertisements, banners and signage.

C.3.6 Data and Assessment

Purpose

Effective use of data is essential for our academies. Our Data and Assessment team ensure the Head Teachers and LGBs are given detailed and timely information to support their analysis. The team supports academies by providing effective advice and guidance on all elements of statutory national curriculum assessment, recording and reporting requirements across all key stages. We provide analysis of in-academy progress data, including benchmarking information and group analysis.

Key Contacts

Catherine Hayes	Trust Data Manager	<i>catherine.hayes@whptrust.org</i>
Sandie Wilson	Trust Data Manager	<i>sandie.wilson@whptrust.org</i>

What we offer

The Trust's Data and Assessment team lead in the provision, co-ordination and arrangement of management and performance information across the Trust, which includes:

- Direction and advice on collection of assessment and examination data, including SATs, GCSEs and A Levels
- Advice on, and support with, monitoring progress and reporting to parents/carers.
- Benchmarking and target setting.
- Insight analysis on data collected including attendance, attitude to learning, progress and behaviour.
- Termly data collection for internal and external reporting.
- Termly production of in-house Inspection Data Summary Report (IDSR).
- Checking and confirming accuracy of data for DfE Performance Tables.
- Training of SLT and other relevant academy-based staff on use of Trust wide assessment software and systems for data analysis purposes.
- Consolidation of data from academies in the Trust to provide benchmarking and MAT level data overview.
- Creation and development of standard templates and practices for academy-based processes that support consistency across the Trust, in line with decision of Trust Leaders Group.
- Guidance on best practice for assessment and examination procedures.

C.3.7 Recruitment

Purpose

The recruitment of high-quality staff is essential to the success of our academies. We provide a comprehensive support service to support Academy Head Teachers and LGBs.

Key Contacts

Karen Sims	Trust Operations Manager	<i>karen.sims@whptrust.org</i>
Tracey Tacey	Trust Operations Assistant	<i>tracey.tacey@whptrust.org</i>

What we offer

The Trust supports academies with recruitment from the start of the process to the offer of employment and issuing of contract.

- Advice and assistance in preparation of adverts / job description / person specification.
- Placement of advert in relevant publications / website *.
- Processing all pre-employment checks in relation to newly appointed employees including references; I.D., Right to work in UK, Teacher Prohibition check, Childrens Barred list, qualifications check/ EEA prohibition /sanction check, section 128 Direction check, DBS check and medical fit for work and others that may be required.
- Organising shortlisted candidates for interview and support on the day if required.
- Provision of contracts of employment to newly appointed staff or to existing staff moving to a new role within the Trust.
- Support for recruitment panels for senior or specialist posts.

* Adverts charged back at-cost to academies.

C.3.8 Property and Estates

Purpose

The Property & Estates team have the professional responsibility for the development and delivery of all property and estates services across the Trust. They provide building and construction expertise to support academies and are the principal advisor on all land, property and estates matters. Our Head of Property & Estates helps academy leaders ensure that their sites are safe and compliant. Together with ensuring our schools get best value for all estate services.

Key Contact

Colin Strawbridge Trust Head of Property and Estates colin.strawbridge@whptrust.org

What we offer

Setting up and monitoring of cleaning contract and hygiene services.

- Yearly review of cleaning requirements / contracts.
- Quarterly Inspection of Cleaning Standards.
- Implementation and monitoring of Agreed Service standards / KPIs.
- Support on arranging One off cleaning e.g., Deep Cleans.
- Management of site/cleaning teams, in liaison with Academy Heads
-

Advice and monitoring of refuse/utilities contracts.

- Annual review Utility Contracts,
- Benchmark Energy and Water usage across Trust sites.
- Advise on energy and water saving devices where appropriate.

Maintenance advice and guidance.

- Review of authorised suppliers.
- Ensure all statutory maintenance and checks are carried out.
- Set up and maintain a trust Framework Provision for maintenance and repairs.
- Implementation of Sypro and monitoring site adoption and usage.

Provision of advice for Local Governing Bodies

- Ensuring that staff are deployed effectively to provide an effective service to academies.
- Management of site teams, in liaison with Academy Heads.
- Meet with Site Staff on a monthly basis or more frequently if required.
- Review of the number of Site staff required, hours worked, rotas, and capability.
- Coordination of Holiday / Absence cover.
- Ensure all staff are appropriately trained.

Management of academies grounds service

- Yearly review of ground keeping requirements / contracts.
- Implementation and monitoring of Agreed Service standards / KPIs.
- Support on arranging one-off services e.g. tree felling.

Catering

- Annual review Catering Contracts.
- Benchmark cost of provision across Trust sites.
- Coordinate Purchasing of all new capital equipment.
- Implementation and monitoring of Agreed Service standards / KPIs.

Health & Safety

- Carry out annual Health and Safety Audits and reporting to Trust/Academies and manage remedial action.
- Monitoring of regular testing – Legionella, water coolers, PAT, Hard Wire, fire alarm and extinguishers, emergency lighting, Asbestos Survey and Plans, regular equipment checks for workshops, playground and PE equipment.
- In conjunction with the Head Teachers:-
 - Update Health and Safety Policy Annually.
 - Ensure all risk assessments are in place.
 - Staff Health and Safety Training plans developed and implemented.

Meet with Academy Heads

- Monthly review with Heads to review Property/Estates needs/issues.
- Budget review and anticipated future spending requirements.

Provide strategic overview of Trust Estates development

- Liaison with external partners/contractors related to property and estates.
- Co-ordinate capital bids in line with strategic plan.
- Review Site Conditions Survey.
- Manage maintenance/development programme, including decoration/refurbishment.
- Advise on budgetary requirements.
- Manage any external letting / property opportunities.

D. Academy Improvement Strategy

D.1 Purpose and Approach

D.1.1 The purpose of the WHP **Academy Improvement Strategy** is to ensure that all academies within the Trust are performing at a level that is at least good, and all are engaged in an effective process of continual improvement.

D.1.2 The Trust maintains an accurate and in-depth knowledge of each academy and its current performance in order to:

- Sustain and build on success where it already exists
- Develop strengths where there is a need to improve
- Implement rapid improvement strategies where necessary
- Share expertise through mutual support and challenge

D.1.3 The Trust **Academy Improvement Team** delivers academy improvement by:

- Carrying out **due diligence** on new academies
- Carrying out regular **quality assurance and academy review**
- Providing a **core support** offer for all Trust academies
- Providing **additional support** appropriate to individual academy needs
- Implementing a Trust-wide **Continuing Professional Development** strategy
- Accessing a range of **external support** through strategic partnerships.

D.2 Meet the Team

D.2.1 The Trust is able to draw upon a range of skills and experience as follows:

D.2.2 **Dr Paul Heery** is the Trust **Chief Executive Officer**. He has had over 20 years' experience of Headship, including at primary, middle and secondary academy level. He has been a School Improvement Partner for over 20 schools, a Local Authority Senior School Improvement Adviser and managed the Primary Strategy for Leicestershire County Council. All schools he has led have improved their Ofsted ratings and have been taken to Good or equivalent, including one school that required Special Measures when he took up post. He is a Lead Inspector for Ofsted and inspects both primary and secondary phases. He has a Masters Degree and a Doctorate in Educational Leadership.

D.2.3 **Lisa Rockley** is the Trust **CPD Leader** and the **Secondary Improvement Lead**. She has managed the CPD and coaching programme in the Trust for the past 4 years. She has played a leading role in the development of teaching and learning in the Trust and has extensive experience in leading Inset training, including organising and presenting CPD conferences. She is an accredited NPQ trainer, an Advanced Skills Teacher, and an experienced coach.

D.2.4 **Jacqueline Sainsbury** is the Trust **Director of Primary**. She is the Executive Head Teacher of the Florence Nightingale Academy and has taken the school on a journey of improvement, from Special Measures when she took up post in 2009, to one of the highest-performing schools in the region. She is an accredited NPQ trainer and an experienced leadership coach. She leads the Academy Improvement Strategy in our primary schools.

D.2.5 The Trust **Primary Improvement Lead** will be appointed from one of the senior Primary School leaders in the Trust academies. Their role is to support the development and improvement of teaching and learning in primary schools, and manage primary support programmes.

D.2.6 **Simon Morton** is the Trust **Safeguarding Lead**. He is an experienced DSL and has delivered training and support, as well as working closely with a range of external partners and agencies.

D.2.7 **Sandie Wilson** and **Catherine Hayes** make up the Trust **Data Team** - they provide analysis of academy internal assessment data and external exam and test results, enabling Head Teacher's and LGBs to identify key strengths and weaknesses, and areas for improvement. The team supports academies in the analysis of performance by group and pupil characteristics.

D.2.8 **Claire Holland** is the Trust **SCITT Lead**. She works with local SCITT and PGCE providers to set up the teacher training programme and provide support and advice for students and mentors

D.2.9 **Janet Rigby** is the Trust **SEN Lead**. She is a highly experienced SENCO and leads the Family SEN team. She works with Trust academies to provide advice, support and challenge as required, as well as specialist diagnostic support and assessment for access arrangements.

D.2.10 **Vicky Barnett** is the Trust **Careers Lead**. She provides advice and support to staff in academies as they work towards the Gatsby Benchmarks. She liaises with external partners to provide opportunities and support for pupils, both within and beyond the curriculum.

D.2.11 **Cameron Wedgeworth** is the Trust **Music / Enrichment Lead**. He is a teacher and a music specialist who supports the development of instrumental and choral music both within and beyond the curriculum. He leads Trust-wide performance even

D.2.9 In addition to the core Academy Improvement Team, the Trust identifies high-performing and experienced staff who have capacity to provide specialist support in key areas across the Trust academies both as **Trust Leads**, currently recruiting for Leads in **Blended Learning, Maths, English, Science, Early Years, MFL** and **Humanities**. Work carried out by Trust Leads is recharged on a sessional basis.

D.3 Quality Assurance and Academy Review

D.3.1 The Trust's Quality Assurance procedures supports school self-evaluation and allows the Trust to monitor academy performance through an annual cycle of review and evaluation, including a Trust-wide risk assessment process that leads to categorisation of academies (A-D).

D.3.2 The Quality Assurance process is led by the Chief Executive Officer and Director of Primary Hub who support Head Teachers and other executive leaders in the formulation, implementation and review of Academy Action Plans. Action Plans are approved annually by Trustees.

D.3.3 The following table sets out the minimum Quality Assurance processes for each Academy:

Subject review	Chief Executive Officer / Sec / Prim Lead	Termly	Support academy QA through a subject review in line with 'Deep Dive' methodology.	Report to HT / LGB
Theme - focussed review	Trust AI Team	Annually	Support academy QA through a theme focussed review e.g. Behaviour, SEND.	Report to HT / LGB
Achievement Data Analysis	Trust Data Team	Termly	Analysis of internal academy data termly Annual detailed analysis of external performance data.	Report to HT / SLT Summary to LGB RAG rating to Trust Board
Behaviour / Attendance	Trust Data Team	Termly	Analysis of internal academy B&A data termly.	Report to HT / SLT Summary to LGB

Data Analysis				RAG rating to Trust Board
Academy Review	Chief Executive Officer	Annually	Summarise academy evaluation evidence to provide a whole-academy report and evaluation.	Report / RA rating presented to LGB / Trust Board
Safeguarding Review	Trust Safeguarding Lead	Annually	Safeguarding audit of practice and procedures.	Report to HT / SLT Summary to LGB RAG rating to Trust Board
Health & Safety Review	Trust Operations Director / Head of Property and Estates	Annually	Health & Safety audit of practice and procedures.	Report to HT / SLT Summary to LGB RAG rating to Trust Board

D.3.4 Each Head Teacher is accountable to the Local Governing Body (LGB) for the overall effectiveness of the academy, including academic achievement. The LGB provides challenge for the Head Teacher directly through their Appraisal Committee. The Appraisal Committee meets at least twice a year in order to include a mid-year review of progress towards objectives.

D.3.5 Although individual Head Teachers determine the specific academy improvement processes, there are a number of common elements that the Trust requires to be in place in each academy:

Annual Academy Improvement Plan	To enable leaders to outline the goals, success criteria and monitoring mileposts for improvement, and to share the academy's current performance, goals and aspirations with staff and governors.
Academy Self-Evaluation Review	To summarise the academy's overview of its performance based on its self-evaluation. This may be based on the Trust Academy Review (see above).
An effective self-evaluation process	To enable leaders to have an accurate view of: <ul style="list-style-type: none"> • the quality of teaching and learning, • the quality of leadership, • the quality of safeguarding and • the academy's overall effectiveness.
An effective internal assessment and data tracking system	To monitor progress and outcomes throughout the year for all pupils.
Pupil / parent / staff voice	To ensure that effective systems operate for determining and acting upon the views of key stakeholders.

D.3.6 The Academy Improvement Team meets at least monthly to discuss the support / categorisation of all academies in the Trust, allocate resources and confirm schedules.

D.4 Support for Academies in each Performance Category

D.4.1 Academy Improvement support and intervention is provided on a graduated basis, depending on the outcome of the academy risk assessment.

Risk Assessment			
Cat	Descriptor	Expectation	Trustee action
A	Academies that are currently judged to be at least good in all areas, with elements of outstanding practice	Share best practice and deliver academy-to-academy support within the Trust.	N/A
B	Academies that are currently judged to be good overall	Have the capacity to bring about improvement and may also have the capacity to support others within the Trust.	N/A
C1	Academies that are currently judged to require improvement, but evidence indicates that they are making rapid progress.	Work with the CEO and Academy Improvement Lead to implement an Action Plan drawn up jointly by the CEO and Head Teacher, and approved by Trust Board. Termly update on the Action Plan progress to the CEO and Trust Board.	Trust Board monitors progress of Action Plan
C2	Academies that are currently judged to require improvement but are at risk of Ofsted category 4 because they are making slow or limited progress.	Significant external support required - work with CEO and Academy Improvement Lead to implement an Action Plan drawn up jointly by the CEO and Head Teacher, and approved by Trust Board. Termly update on the Action Plan progress to the CEO and Trust Board – if insufficient progress made, consider move to Cat D.	Alert Notice issued to LGB
D	The academy has been designated by Ofsted as in Special Measures OR The Trust has been asked to sponsor the academy due to serious concerns over its performance OR Trust QA has identified serious performance concerns.	This academy will be led by a Trust appointed Executive Leader, who will be responsible for the implementation of an approved and costed Improvement Plan. The CEO will monitor progress on a half-termly basis.	Trust Board assumes responsibility either through an appointed Chair or an Interim Board

D.4.2 All academies receive further support from the Trust team, as set out in the Academy Handbook, for management and administrative functions, such as HR, Recruitment and IT, covered by the Academy Contribution. For academies in Category C and D, the provision and impact of additional support is reviewed termly and reported to Trust Board / LGB. The minimum level of academy improvement support depends on the categorisation, as set out below:

Category	Provider	C	D
Academy Improvement meeting with HT	CEO	Monthly	At least monthly
Academy Leaders Group	CEO	Monthly	Monthly

CPD / Training support meeting	CPD Lead / Primary Hub Director	Half-termly	At least half-termly
Additional CPD funding	CPD Lead / Primary Hub Director	£2000 / year	£5000 / year
Specialist support days	Specialist Support Team	Up to 10 days / year funded	Up to 10 days / term funded
Additional IT / Comms Support	Trust IT / Comms team	5 days / year	10 days / year
Additional data analysis support	Trust Data Team	1 day / term	2 days / term
Additional SEN support	Trust SEN Lead	1 day / term	2 days / term
PP Review	CEO		Annual
Support / advice for LGB	Trust Governance Manager		2 days / term

D.4.3 The strength of our Trust lies in the expertise we have in our academies, and the greatest tool for improvement is in generous collaboration and sharing of good practice. Each academy will provide up to 10 days school improvement support into the Trust 'pot' and will likewise receive up to 10 days support from fellow Trust academies without any additional income or recharge. However, if the net support exceeds 10 days in total, this will be charged to the academy receiving support and refunded fully to the academy providing it, at a rate of £250 per day.

D.5 Access to External Advice and Support

WHP is built on an ethos of collaboration. We work in partnership with a range of organisations both to access high quality support and advice, and to provide professional development and career opportunities for Trust staff.

Broxtowe Active Sports Collaboration	The local Sports Collaboration is run by a Trust employee and provides an impressive range of activity and support for primary academies.
WHP Collaboration	Formal collaboration of local schools, including 9 primary schools, sharing CPD, support peer review and share leadership capacity and expertise. In the past year, we have run Middle Leader development programmes, provided a programme of Governor training and provided advice and support for school improvement planning.
East Midlands CPD Partnership	A group of 5 local MATs collaborating to run NPQ programmes in partnership with Ambition Institute, and to share advice and support.
Broxtowe SBAP	Local partnership of schools providing access to Behaviour Support advice, and sources of additional funding.
PixL	Membership of PixL provides opportunities for the sharing and access of expertise, and performance information with a large number of schools and Trusts across the country.
Global Schools Alliance	We are a leading member of a group of schools making connections and promoting learning internationally, supporting our programme of international school links

D.6 Continuing Professional Development

The role of the Trust is to support our academies in their mission to provide the very best opportunities for young people. The desire for continual improvement is central to this mission. Our strength comes in the collective knowledge and expertise that we share. Our Academy Improvement Strategy recognises that our academies have differing capacities, but all have something to offer.

CPD is delivered through a range of methods, depending on the needs of the cohort and structure of the module. These include face-to-face large group training sessions, remote online learning, one to one and small group support, and courses delivered using the WHP CPD App.

Access to the WHP CPD Hub App is provided for all employees of WHP schools. It provides a wide range of online courses, including courses bespoke to WHP. Courses can be used as stand alone modules, as part of a wider CPD programme, or can be linked to performance management objectives / school improvement priorities.

We also extend the CPD offer to colleagues beyond the Trust. We believe we have much to offer and much to learn. There will be a small charge for non-WHP schools to cover admin, hospitality and resources.

Teaching and Learning		
Teaching and Learning Briefings	All Teaching staff	Weekly updates emailed to all staff
Research and Inquiry Groups	Open to all staff	Groups across academies carry out supported action research projects on a topic of relevance / interest
Annual Conference	All staff	Summer term themed educational conference for all WHP staff
Discussions and Debates	All staff	Access to regular research-based articles and reflections with an opportunity to contribute to these for individuals
Safeguarding	All staff	Regular updates for all staff including shared materials and statutory training, including annual KCSiE update
Trust Teaching	All staff	Termly newsletter to celebrate CPD achievements, share professional learning from Trust staff and advertise events
Primary Maths Development	Primary Teachers	Practitioner-led Maths network to support the development of Maths across academies
Support and Coaching		
Teaching Excellence Programme	Expert teachers	A programme of observations, following a 'Lesson Study' approach, including planning and reflection opportunities
Shadowing / Mentoring programme	Aspiring leaders	Paired good practice visits and reflections with a leader from another school in order to understand their role
Individual Coaching Programme	Teaching staff	More intensive support for members of staff to improve and reflect on the quality of their teaching
CPD Programmes		
Newly / Recently Qualified Teacher Programme	NQTs / RQTs	A network of NQTs and RQTs in order to provide a peer support network, with sessions tailored to need.
Leadership Development Programme (NPQ)	Aspiring Leaders	A programme of National Professional Qualifications (NPQs) aimed at all levels of aspiring and new leaders
Teaching Assistant Development Programme	TAs	Annual development programme aimed at TAs in all phases and roles

Support Staff Development Programme	Support Staff	Annual development programme consisting of modules targeted at the range of support staff roles in the Trust
Governor Development Programme	Governors / Trustees	Development programme combining bespoke training with targeted modules and Trust-wide sessions
New staff Induction programme	New staff	A supportive structure which ensures Trust staff feel welcome and introduced effectively into their new post.

E. Financial Model

E.1 Statement of Principles / Rationale

Introduction

This Financial Model is driven by the vision and values of the White Hills Park Trust (WHP). Its purpose is to allow our academies to function efficiently and effectively, making the best use of all the available resources, always maintaining our focus on the interests of our pupils.

The key principles underpinning our financial model are:

- All of our Trust policies and systems are ethical and transparent, in accordance with the values of the Trust.
- We hold ourselves accountable to all stakeholders, within and beyond the Trust.
- Our academies undertake to share risk and responsibility, whilst maintaining financial autonomy.
- The purpose of the financial model is to support high-quality provision and deliver excellent pupil outcomes.
- We always seek to achieve best value, and use resources with care, including public funds.

The financial autonomy of each academy within the Trust is maintained, within well-defined parameters for budget setting, building up reserves for the future and also contributing to the financial success and development of the overall Trust.

Funding

- All Funding streams, including GAG (General Annual Grant) income, will be received directly into the individual academies within the Trust. The Trust manages financial risk and opportunity via the use of strategic reserves (See below for further detail) *.
- Until the Trust reaches c 3000 student numbers, the Trust will be required to make bids on behalf of academies to DfE funds such as CIF, for capital funding for specific projects.
- Once the Trust is entitled to receive a capital allocation, an application system will be introduced, supported by a Trust-wide capital development plan.

* Separate transition arrangements exist for the allocation of funding between Alderman White School and Bramcote College. Please see individual funding policies for details.

Reserves

Academies maintain **operational** and **strategic** reserves.

Operational reserves are designed to enable individual academies to manage fluctuations in their normal operating income and expenditure. Utilisation of these reserves will be at the discretion of the academy. The operational reserve should always be positive and generally more than 1% and less than 3% of current year GAG income. Where an academy's operating reserve is forecast to fall outside of these parameters, the Trust works with the academy to develop a plan to bring the reserve into line over an agreed time period. Positive operating reserves remaining at the financial year-end are carried forward to the following year and can be taken into account in the budget setting process.

Strategic reserves are maintained to manage the wider financial risk profile of the Trust and to allow for larger planned expenditure which would fall outside of the parameters of an academy's operational budget.

Academies are expected to maintain strategic reserves at a level of between 1% and 1.5% of current year GAG income. It is noted that academies may not be able to achieve this target range – challenges such as increasing pupil numbers in a lagged funding system, or long periods of staff absence may mean that the academy has to focus on maintaining its operational reserve only. However, if strategic reserve levels do

fall below threshold in an academic year, it would be expected that the budgeting process for the following year would include a contribution towards increasing the reserve going forward.

The strategic reserve is a pooled resource, designed to respond to need, but also to opportunities. Utilisation of strategic reserves will be decided upon by the Trust Executive team, subject to approval by the Board of Trustees. Academies will be required to apply for approval either to access their own strategic reserve and/or to access that of others if their own reserves are insufficient for the planned level of expenditure.

In the event that an academy accesses the strategic reserve of other academies in the Trust, the Trust Executive team and Board of Trustees will work with them to establish a repayment profile which returns the academy to a positive reserve position within a fair and reasonable timeframe.

The Trust Reserves Policy enables an academy to appeal against a decision made by the Trust Executive team and Board of Trustees to allow another Trust academy to access Trust strategic reserves.

Central charges

- Trust staff and central services costs are allocated to Trust academies via a monthly recharge. This recharge is at cost, and is set in advance of each academic year for the rolling 5 year forecast period.
- The charge is a percentage of GAG income, calculated to cover costs only - the Trust does not generate any profit element on this recharge. As such, any increases year on year relate to inflationary factors and external changes in staff pay rates. For new schools, the 2020/21 charge is set at 4.5%.
- The School Improvement Strategy allows the Trust to provide additional support to an individual academy from existing Trust capacity, in line with academy categorisation. Where an academy requires further support and input from Trust staff than allowed for under the terms of the School Improvement Strategy, an additional charge may be made to the academy.
- Trust support is limited to the roles and central services detailed in the WHP Handbook for Academies. Services provided by the Trust that fall outside of those detailed in the handbook will be charged to the relevant academy/ies at cost.

Budgeting

Expectations, timing and approvals:

- The Trust maintains a 5 year rolling forecast for each academy. Whilst greatest emphasis will be placed on the detail for the following academic year, assumptions underpinning the subsequent years will need to be articulated.
- Re-forecasting takes place on a termly basis.
- Finance team support is provided throughout the budget setting process, and on an ongoing basis as required as academies re-forecast.
- Academy budgets run from 1st September to the 31st August. Budget allocation is provided as early as practicable to academy Head Teachers and LGBs. In line with the Scheme of Delegation, the academy is responsible for setting their budget, with support from the Trust Finance team. Academy budgets are submitted to the Audit and Risk Committee for scrutiny at the summer term meeting (normally mid-June). They are presented to the final summer term Trust Board meeting for formal approval and authorisation.

Budgeting principles:

- Academies are obliged under the terms of the Academies Financial Handbook to set a “balanced budget”. In certain academic years over the forecast period, this may require the utilisation of brought forward reserves, when in-year expenditure exceeds in-year income. However, a positive year end position must always be maintained, unless specific approval has been given by the Trust Board.

- Academies falling short of targeted operational and/or strategic reserve levels should budget for a contribution to their reserve in accordance with the plan agreed with the Trust finance team.
- Expenditure in key areas such as staffing, maintenance, utilities and IT should remain within agreed benchmarking parameters as determined by the Trust and communicated to academies at the start of the annual budgeting process.

Reporting

- Termly financial reports for each academy are reviewed by the Trust Audit and Risk committee. The committee may require the academy to take action to maintain a balanced budget, in line with forecasts.
- The Trust finance team manages the process of external reporting and audit, and reports relevant issues to the Academy Committee and the Local Governing Body.
- The Trust finance team manages the process of internal audit and scrutiny and reports relevant issues to the Head Teacher and the Academy Committee.
- The Trust Executive team provide a termly RAG-rated financial overview to the Trust Board.

E.2 Benchmarking

Our Financial Record

The Trust has a record of sound and prudent financial and resource management. This has enabled our academies to make the best use of all available funding. In accordance with our values, we ensure that our systems are transparent and based on the careful and ethical use of public funds.

As a result of efficient management, we have maintained increasing levels of unrestricted reserves for the last 3 academic years, despite rising staff salary and pension costs and a climate of ongoing funding challenges.

Whilst the lagged funding model presents challenges when academies have increasing pupil numbers, tight financial controls and robust forecasting processes/procedures have allowed the Trust to maintain its investment in staff and ensure that there is sufficient resource and support for our students.

The table below gives an indication of the recent financial performance of the Trust:

	2017	2018	2019
Unrestricted reserve balance at year end (£'000)	0	37	86
Percentage of GAG spent on teaching and teaching support	72.18	73.65%	74.78%
Teaching FTE		88	87
Support Staff FTE		60	60
Pupils on roll	1205	1201	1265

F. Trust Growth Plan

White Hills Park initially consisted of two secondary schools, Alderman White School and Bramcote College and Sixth Form. In January 2020, The Florence Nightingale Academy (formerly known as Brookhill Leys School) became the first primary school approved to join the Trust. The Trust is founded on the principle that by working together, our academies become beacons of outstanding practice, providing opportunities and benefits for pupils and the local community. The compelling values that drive our work are demonstrated in practice through:

- Working in partnership, sharing good practice, pooling resources and participating in joint projects for the benefit of pupils
- Consistently outstanding pastoral care and provision for all learners including disadvantaged pupils and those with SEND
- Commitment to high quality and generous collaboration and the development of strong and effective leaders contributing to education across the region
- Extensive, seamless and high-quality enrichment programmes, encompassing the arts, sport, good citizenship and all areas of the curriculum, accessed by all groups of pupils
- Expansive opportunities from our powerful international dimension, that make our pupils capable of assuming life and work environments in the 21st century
- Open, transparent and ethical systems of finance, leadership and management.

School Improvement and Short- to Mid-Term Growth Strategy

In January 2020, Brookhill Leys Primary School (now renamed as The Florence Nightingale Academy) was approved to join the Trust and is now the lead primary school for WHP. WHP is now developing a school improvement function for both primary and secondary schools which will enable us to support other schools as the Trust grows.

Two additional primary schools will be joining the Trust in 2020/21. The Trust intends to build overall capacity in the short-term in order to be equipped for anticipated growth. Our short-term growth strategy will ensure that all academies within the Trust, and those joining in the coming months, are performing at a level that is at least good, and all are engaged in an effective process of continual improvement. The Trust will deliver academy improvement by:

1. Appointing an Academy Improvement Team
2. Carrying out due diligence on new academies
3. Carrying out regular quality assurance and academy review
4. Providing a core support offer for all Trust academies
5. Providing additional support appropriate to individual academy needs
6. Implementing a Trust-wide School Improvement and Continuing Professional Development strategy
7. Accessing a range of external support through strategic partnerships.

This will ensure that the Trust is able to build accurate and in-depth knowledge of each existing and joining academy and its current performance in order to sustain and build on success where it already exists, implement rapid improvement strategies where performance is weak and share expertise through mutual support and challenge.

Long-Term Growth Strategy

The Trust has the potential for further expansion and the existing academies have the capacity to be system leaders. The Trust's ambition is to grow sustainably to become a mixed primary-secondary Trust, with a target of 4-5 secondary academies and 8-10 primary academies within 3-5 years. All academies will be located in the local area to ensure that each is able to benefit from local support as well as that of the MAT itself. The academies will be closely aligned, and will share the WHP vision, ethos and ethical standards.

The academies will share the following characteristics:

- High performance, with excellent outcomes for pupils
- A strong commitment to professional development of staff, and the commitment to maintain a healthy work-life balance for all our members of staff
- Strong leadership, characterised by openness and a drive to improve
- A commitment to inclusion
- A commitment to the local community and social justice
- An inspiring curriculum, with breadth and balance, delivered through formal lessons and extensive enrichment
- A commitment to collaboration within and beyond the Trust, making a positive input into the wider system.

There are several interlinked areas that will facilitate the growth outlined. These include geographical logistics, governance, leadership, training and economies of scale. Consistent attention to the sustainability of the Trust will be evaluated before and during any growth that takes place. This will be an example of our belief that high-quality provision can be achieved through local collaboration and resource pooling.

G. Policies

Human Resources

- Performance Management of Academy Staff (capability procedure)
- Staff Discipline, Conduct & Grievance
- Appraisal
- Pay
- Employee Code of Conduct
- Flexible Working
- Fraud
- Grievance
- Gifts & Hospitality
- Harassment
- Leave of Absence
- Managing Attendance
- Maternity, Paternity, Adoption
- Disciplinary
- Staff Wellbeing
- Whistleblowing
- Anti-Bribery

IT / Data

- Data Protection
- Freedom of Information
- General Data Protection Regulations (GDPR)
- Management & Retention of Records
- Staff IT

Health & Safety

- Emergency Plan
- Health & Safety
- Asbestos Management
- Keeping Classrooms Safe – Physical Intervention
- Lockdown
- School Visits

Curriculum

- Careers Guidance
- Curriculum

Finance

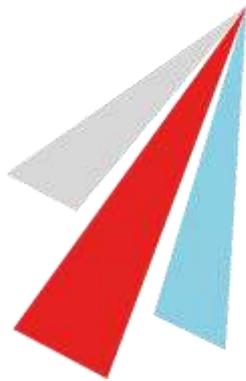
- Charges & Remission
- Business Continuity
- Financial Regulations
- Investment
- LGPS Discretions
- Risk Management /Register
- Lettings

CPD

- NQT Induction
- Staff Induction
- CPD

Trust Governance and Management

- Trust Safeguarding Statement
- Complaints
- Equality Information and Objectives
- Equal Opportunities
- Trustee's/Governor's Expenses
- Quality Assurance



The White Hills Park Trust

A Culture of Excellence

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