

Information Pack

Diocese of Chichester Academies Roadshow

The Amex
29-11-2022



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Hello!

An introduction to our trust



Exciting times

The Bishop Otter Academy Trust or 'BOAT' is finally 'sailing'. Last June, St Nicolas & St Mary's Primary School in Shoreham became the first school to get on board and join the trust. This marks an exciting stage for the trust as we seek to grow and work in partnership with others to deliver high quality education experiences to all our children. This includes providing an innovative, inspirational and inclusive curriculum, driven by research and best practice.



We aspire for every child to achieve their potential and be equipped with '**wisdom for life**', as we work in partnership with local churches and local communities. We care deeply for our children and their well-being.

The trust believes in the importance of collaborative partnership working. Although we are currently a small trust, we are working with a wide range of partners and service providers so that we have both the expertise and capacity to be a strong and effective trust.



We are now looking for **inspirational, pioneering leaders who want to share ownership and shape our trust as we move forward.** Please be in contact if this could be you.

We hope that this pack, and our website at www.boat.academy, will provide you with further information about BOAT and how you can join us on this new journey.

BOAT Builders

Inspirational
Pioneer?

See page 14



Be in touch!

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Our Vision

The Trust is aspirational for every child to achieve their potential and be equipped with '**Wisdom for life**'.

We aim to be a mutually supportive community where we strive for transformational educational excellence through effective partnership within and beyond the Trust.

Children

Our #1 priority

Education and well-being

BOAT is an education charity set up to give children a better future. It has a single legal and moral purpose: To advance education for the public benefit.

It also has a 'spiritual' purpose to help children, and the wider community, to flourish within a '*contextually-appropriate theologically rooted vision for education that reflects its foundation as a church school.*' (SIAMS Framework for September 2023).

In a nutshell, trustees want children to excel and flourish in each of our unique school communities – and that is what BOAT is for.

Same or different?

When children join the trust we want them to understand what will be the same and what will be different in their school. That's why we have produced videos and newsletters to help explain these things as simply as we can.

Count the Otters!

How many otters
can you find on
this page?

Wisdom for Life

As a trust we are focused on learning about '**Wisdom for Life**' as described in James chapter 3 verses 17 and 18. We will be producing a series of collective worships on this theme soon.

Vision

'Christian values'
'community life together'
'distinctive but inclusive'
'pursuit of wisdom for life'
'mutually supportive community'
'transformational educational excellence'
'effective partnerships'

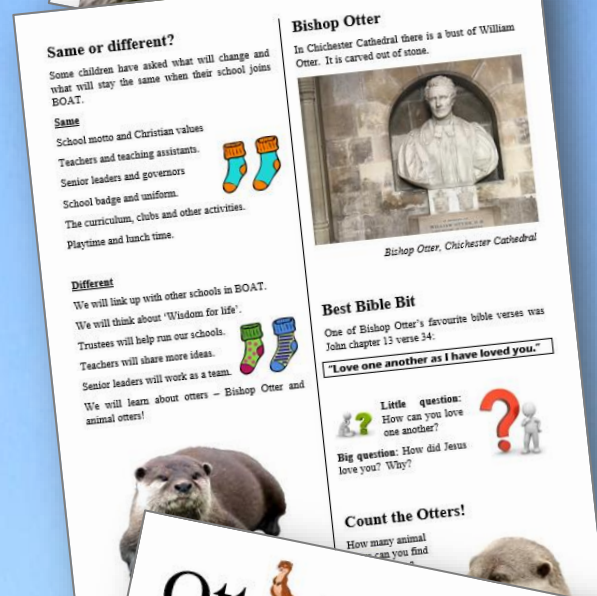
Who is Bishop Otter?

We want children to learn about our diocese, our history and, of course, Bishop William Otter who set up the Diocesan Board of Education. We also want children to learn about that other type of otter – the wild animal!

Class 'BOAT Book'

Each KS1 and KS2 class has a 'BOAT Book' folder where they can keep BOAT 'Otter News' (see right), information, prayers and reflections throughout the year.

This folder will then move up with them as they move year group at the end of the year.

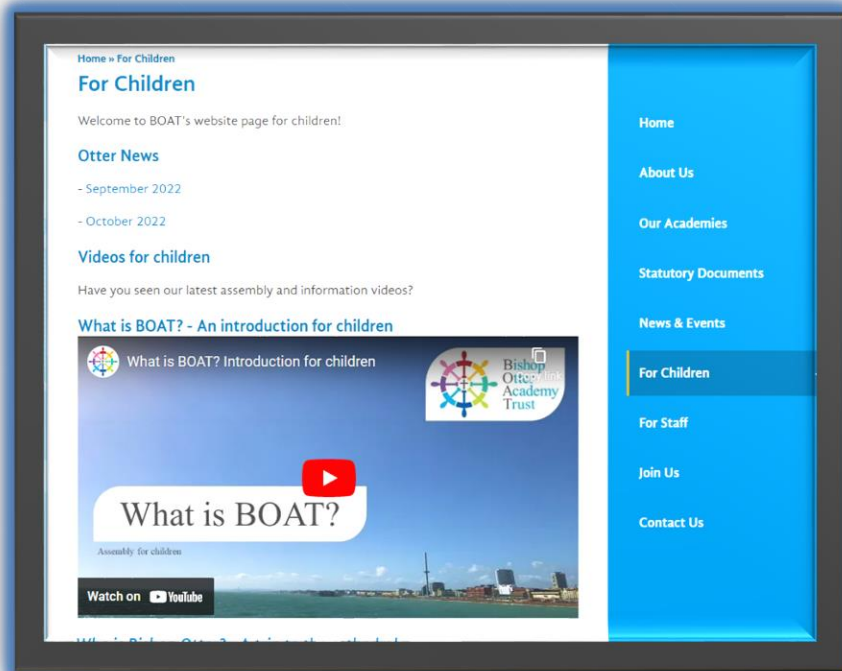


Website <https://www.boat.academy> >FOR CHILDREN

On our website you can find a growing range of resources to help our children, as well as parents and teachers, learn about the trust and our values:

- ★ Monthly 'Otter News' newsletter – quizzes, questions and information
- ★ BOAT Prayer based on 'Wisdom from above' (James 5)
- ★ Inspirational and creative monthly YouTube BOAT videos
- ★ Fun information and links about otters

We hope to develop this section of our website as other schools join our trust.



Looking ahead

At the moment we have one school in the trust. However, as we grow, we want children to appreciate that they are part of a larger family of schools working together. This could include:

- ★ Writing articles for 'Otter News'
- ★ Joint online School Councils to share good ideas
- ★ Eco-challenges – to reduce water and energy usage
- ★ Cross school projects, competitions and fundraising
- ★ Celebrating achievements and outstanding work
- ★ BOAT awards for inspirational children
- ★ Shared worship resources produced by children, staff and clergy

We are looking for inspirational leaders and practitioners who will develop innovative ways for children to work together.



Every school and every child is unique

A phonics programme for one school may not be appropriate for another school with high EAL.

The style and content of worship in a school should mirror the parish, not the trust as a whole.

The type of safeguarding issues, and level of challenge, may vary from school to school.

PSHE has to be adapted for the local context: Is rail safety or drug education relevant?

One school may want to focus on local history – another may have links with the art community.

Some schools have vast fields, others none, but every child is entitled to excellent PE and sport.

**ONE SIZE
DOES NOT FIT ALL**

Staff



Our greatest asset

Our staff are our greatest asset

As a trust we care for our children. One of the ways we do this is to care for our staff. That's why we kept the same pay day and pension arrangements for staff when they joined the trust. That is why we have invested in additional well-being packages and coaching for our staff. It's not just children who need 'Wisdom for Life' and all of its challenges. We want everyone in our trust to flourish.

Terms and Conditions

TUPE regulations give some protection to staff terms and conditions for an indefinite period. For example, if the trust wanted to change terms and conditions after 10 years, we still need a valid reason for the change that is unrelated to the transfer.

Terms and conditions can change for very good reason e.g. to increase rates of pay! Sometimes we have to change policies because of change in governmental requirements. As a trust we are committed to consulting with staff (and their unions) about any such changes.



Trade Union Recognition Agreement

The Bishop Otter Academy Trust (BOAT) recognises the important role of unions in representing and supporting their members. The trust has signed up to a Trade Union Recognition Agreement. This means that we can proactively work with the unions and they will represent staff. We host a termly Joint Consultation and Negotiation Committee (JCNC) attended by trust and union representatives to discuss staffing matters. This is in line with one of our core aims about working in partnership with others.

Partnerships

As a family of schools, we seek to work closely together and share expertise, which creates great opportunities for children and teachers. We will share good practice on the important things - curriculum, assessment and behaviour.

Schools may ask whether existing partnership working will continue after joining a trust. BOAT encourages schools to continue to work in partnership with locality and cluster groups, teaching schools, alliances, specialist hubs, universities, local authorities, the diocese and any other group where it is fruitful to do so. The trust seeks to complement and enhance, not replace, effective partnership working.

Professional Development

Research tells us that high quality teaching can narrow the disadvantage gap. Supporting high quality teaching is therefore pivotal in improving children's outcomes. Existing leaders in the trust have a strong track record of supporting professional development opportunities and we know this will expand as we draw on the expertise of others joining the trust. We want to offer structured career pathways for teachers, supported by professional development both within and beyond the trust.

Research

ImpactEd's study concludes that where staff are satisfied, so are pupils. It says pupils' wellbeing is highest in schools where teachers have a more positive relationship with their work.

impacted.org.uk/impactinpractice

Autumn 2022

What's changed?

The biggest change for staff since joining BOAT are:

- ★ There is security knowing the future direction of the school as part of BOAT.
- ★ Staff have a HR portal where they can access pay slips etc.
- ★ Contract changes and claims are processed more quickly.
- ★ There have been more online courses available.
- ★ There is more well-being support – particularly for support staff.

Communication

We know that effective staff communication is key for any organisation:

- ★ Monthly 'BOAT Bulletin for all staff'
- ★ Regular 'BOAT Info'
- ★ Well-being information – on staff room notice boards
- ★ Union information
- ★ Trustees regularly visit school
- ★ Trustee/Governors – surveys to find out the views of staff
- ★ Opportunities for Q&A and 'BOAT Bakes and Banter'
- ★ Access to minutes
- ★ Website – with a dedicated page 'For Staff' which includes much of the above.



Website

On our website we have a dedicated page for our staff. This includes:

- ★ Information about the trust
- ★ Monthly 'BOAT Bulletin for all staff'
- ★ Well-being information
- ★ Union information

Our website also information about safeguarding and many of our key policies.

Further information is available for staff on our intranet.

Staff Bulletins

Our monthly BOAT Bulletins for staff include information such as:

- ★ **Staffing matters** e.g. staff insurance
- ★ **Compliance** e.g. safeguarding, premises, health and safety
- ★ **Training requirements** e.g. cyber-security training
- ★ **Finance** e.g. important information and advice
- ★ **Policy updates** e.g. what's been agreed and what is coming soon
- ★ **DfE updates** e.g. changes to guidance
- ★ **Trustee update** e.g. latest news and actions

Where next?

We want to continue to support staff with on-going challenges around workload and well-being. We will consider the 'Wellbeing Charter' and consult with staff about what their priorities are. We want to continue to develop our professional development and career pathways.



Senior Leaders

Be a pioneer



We are making a difference

We may be a small trust but we are making a difference right now. As more leaders join, our capacity will grow as leaders use and share their expertise for the common good.



Case Study 1 – Recruitment

Drawing on extensive recruitment experience and current requirements, the trust has produced a comprehensive step-by-step recruitment guide that is compliant with KCSIE 2022. It includes advice, checklists, model letters/emails, scripts for phone calls etc. Associated documents include model adverts, privacy notices for applicants, application form, shortlisting candidates template, model letter to shortlisted candidates, shortlisted applicant form (including self-declaration), interview panel decision record, template job offer letter – to meet current safer recruitment requirements.

Using this pack of resources saves headteachers time and provides reassurance that they are compliant.

“Using the resources which the Trust had put together made the recruitment process straightforward for all involved and it was good to feel confident that we were meeting the necessary safer recruitment requirements.”

Victoria Bishop, Deputy Headteacher

Case Study 2 – Safeguarding

Safeguarding keeps many leaders awake at night. The amount of paperwork associated with safeguarding is staggering.

The trust has produced a Safeguarding Handbook to pull together key information, contacts, resources, posters, links to all the current guidance, website links, professional development resources, flow diagrams etc. The trust also provides a hardcopy Safeguarding Folder with all the key policies and documents.

Using the trust’s safeguarding resources saves headteachers time and provides reassurance that they are compliant.

“The trust has been invaluable in drawing together the key documents that school leaders need.”

It is very reassuring to know that the recent changes in legislation have been identified and incorporated into both our training and reference materials.”

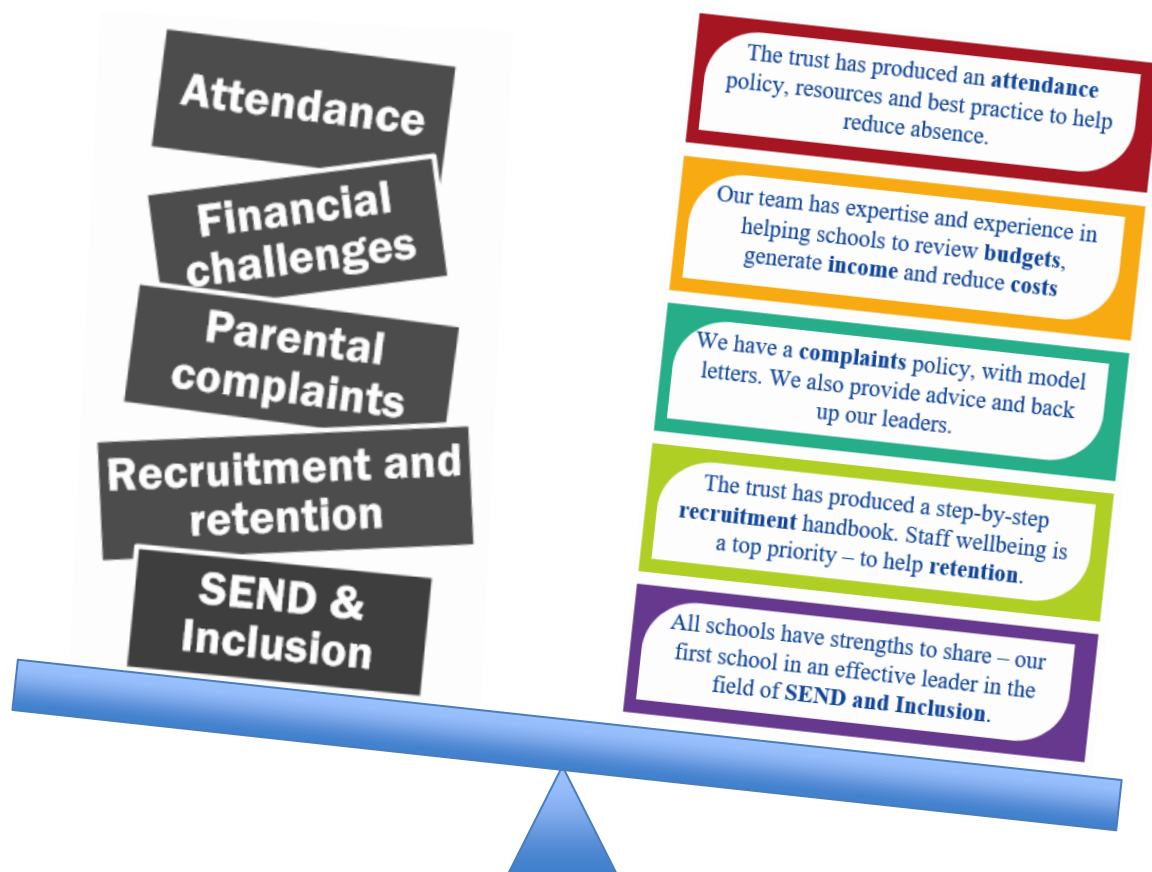
Andy Lincoln, Headteacher

Top challenges

We recognise, as the DfE has done, the many challenges that schools face. We are also proactive in supporting our leaders to deal with these issues. Much we can do in-house – and if can’t, we can signpost to our partners who can.

Top challenges for schools

(DfE, November 2022)



How BOAT is helping

The trust has produced an **attendance** policy, resources and best practice to help reduce absence.

Our team has expertise and experience in helping schools to review **budgets**, generate **income** and reduce **costs**

We have a **complaints** policy, with model letters. We also provide advice and back up our leaders.

The trust has produced a step-by-step **recruitment** handbook. Staff wellbeing is a top priority – to help **retention**.

All schools have strengths to share – our first school in an effective leader in the field of **SEND and Inclusion**.

BOAT Bulletin for senior leaders

We publish a monthly bulletin for senior leaders to provide a whole range of information covering:

- ★ **Staffing matters** e.g. staff insurance, pay updates.
- ★ **Compliance** e.g. safeguarding, premises, health and safety.
- ★ **Training requirements** e.g. cyber-security training.
- ★ **Finance** e.g. important information and advice.
- ★ **Policy updates** e.g. what's been agreed and what is coming soon.
- ★ **DfE updates** e.g. changes to guidance.
- ★ **Trustee update** e.g. latest news and actions.

We make it very clear what is for information and what is for action. Sometimes this is the core team taking action – so schools don't have to.

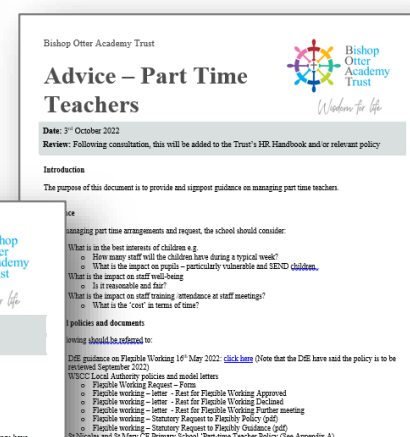
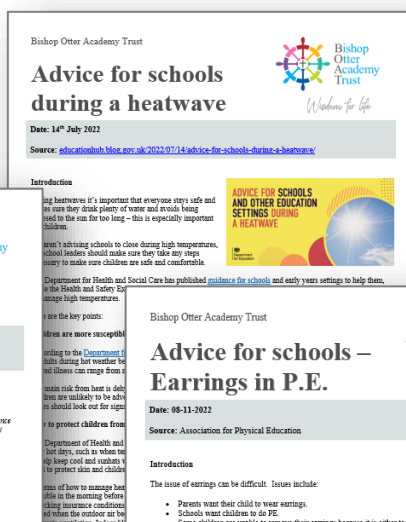
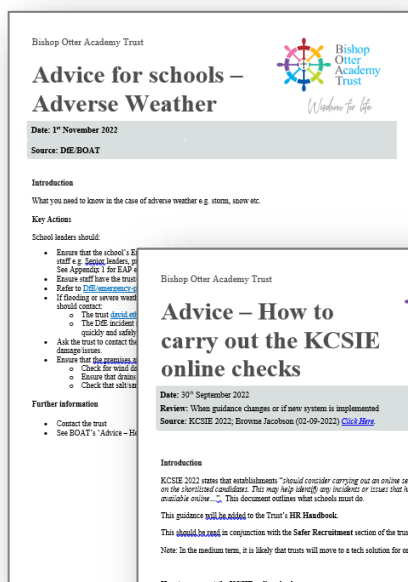
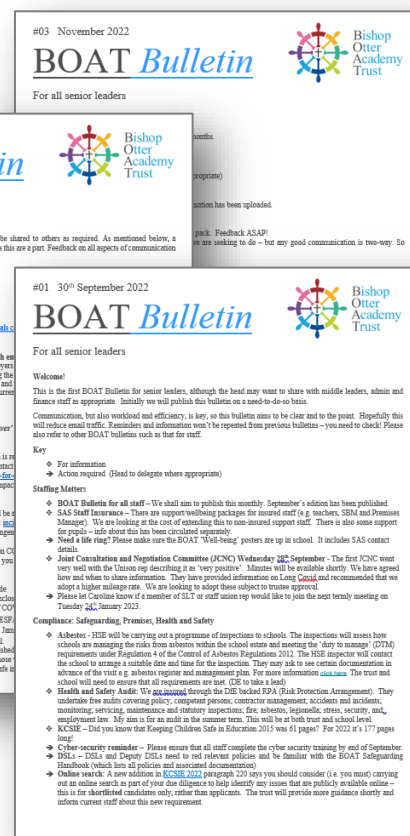
Advice

The trust has started producing 'advice' documents for senior leaders.

For example:

- ★ **Heatwaves** – this was produced to save senior leaders time searching for advice.
- ★ **KCSIE online checks** – guidance for this new requirement was contradictory. The trust did the research and provided detailed 'how to' advice.
- ★ **Part time teachers / flexible working** – this was requested by the school.
- ★ **Adverse Weather** – new advice drawing on DfE and best practice.
- ★ **Extra Bank Holiday pay** – some staff are entitled to additional pay because of additional bank holidays (e.g. QEII funeral). The trust provide advice on how to check who was entitled to extra pay and how it should be calculated.
- ★ **Earnings in P.E.** – The trust provided health and safety advice and model letters to use with parents on the issue.

If you would like a copy of these bulletins or advice sheets, please be in touch.



Governors

Why join BOAT?



The decision

The decision to join a trust is possibly the most important decision that a governing body can make.

BOAT offers a unique opportunity for pioneer schools to join and shape the trust. As a new trust, there is still the opportunity for inspirational leaders and governors to influence what that looks like in practice.

Shaper or follower?

Many governing bodies appreciate that it is a case of 'when' not 'if' they join an academy trust. The limiting factor for schools joining the trust will be the capacity of the trust and its legal team, the Diocese, DfE (Regional Director) and Local Authorities to facilitate the process.

We anticipate our first few schools to be 'pioneers', committed to shaping the trust in its first stage of growth over the next 12 months. *If you want your school to be a shaper, rather than follower, please be in touch.*

New focus

We want governors to focus on the provision of excellent education and care for children in their school. Every school community is unique and different. We believe it should be local governors who take responsibility for this.

As a trust we support this by facilitating school to school support, working in partnership with others and providing challenge. We also provide back office including finance, HR, compliance and premises.

Key questions for governors

Governors may be considering whether their school should become an academy. It may be helpful to think about:

- *How can our school best collaborate with others in a strong resilient structure to ensure that each child excels and that adults have the opportunities to learn and develop as teachers and leaders?*
- *Do we want to be a pioneering school to shape a new trust?*



Julie Searle – Chair of Governors

St Nicolas & St Mary's CE Primary School

We are delighted to have appointed a new Headteacher, Andy Lincoln, and finally join BOAT. We joined BOAT because, as our mission statement says, we want to always 'journey together, guided by God, to do the best we can'.

Joining the trust is doing the best for our children who come to St Nics and St Mary's. We want to be part of a family of schools that will support each other and learn from each other to provide the best rounded education we can with learning and *wisdom for life.*

Research

Data shows that five-year retention rates have deteriorated across every category of school leadership. 25% of primary heads now leave within five years of appointment.

DfE, April 2022

Trust leaders have experience in developing and recruiting senior leaders.



Finance

Earlier this year the trust was awarded £74,000 from the DfE's Trust Capacity Fund. This has been used to help establish the trust and cover some of our initial costs.

We are currently applying for £300,000 from the Condition Improvement Fund for St Nicolas & St Mary's. In addition, we are likely to secure substantial funding for playground improvements.

There are more funding opportunities for trusts which we are proactively exploring.

All schools may need to contribute towards capital projects but VA schools are not required to contribute 10% towards capital funding when they join a trust.

The trustees and executive leaders of all academy trusts are ultimately accountable for their finances. In BOAT we want to empower local governing bodies to take responsibility for local budgets – after all, it is often governors and heads who know the needs of their communities the best.

Scheme of Delegation

All trusts have to have a 'Scheme of Delegation' to explain what members, trustees and governors as well as executive leaders and headteachers are responsible for. Legally, some things have to be done by trustees and the executive team who are *accountable* to parliament. However, much can be delegated to local governing bodies to take *responsibility* for.

A Scheme of Delegation is always a 'work in progress' and is reviewed annually. We need to take into account feedback from current and potential governors and leaders to ensure that it is responsive to the needs of a growing trust.

Trustee vacancy

We are looking for a new trustee, preferably with financial expertise, to join our board. If you, or someone you know, are interested, please email office@boat.academy and we will send you further information. This is a fantastic opportunity to shape our future and make a positive difference to the lives of many children.

Centralisation?

Autonomy?

Trust Level

Some things, by law, have to be agreed at trustee level. This includes certain policies, HR and financial arrangements.

For some things, like compliance, it just makes sense that we all do the same thing and provide that reassurance that it's covered.

Trust Advice & Support

There are many things that the school should decide, but is more efficient if the trust provides clear guidance. For example, a school should decide its uniform policy but the trust can provide a model policy that is compliant with equality laws and DfE guidance as well as including tried and tested advice.

School Level

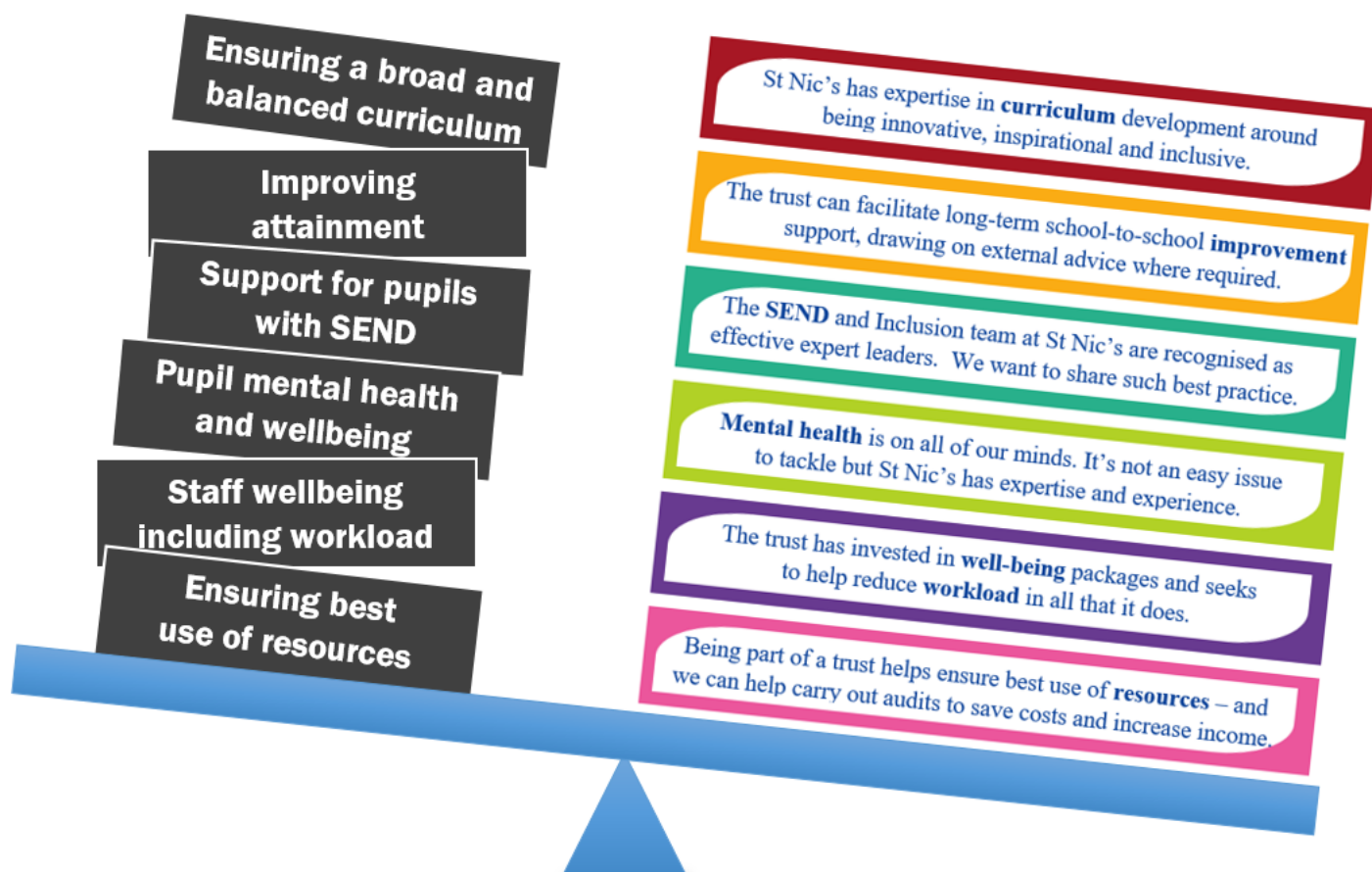
School leaders and their governors know their school the best. The trust believes that schools should take ownership of their children's education and well-being.

All schools are unique – one size does not fit all. Policies around ethos, behaviour, teaching and learning need to be anchored in the local school community.

Leaders should have autonomy to innovate and inspire their learning communities

Top Strategic Priorities

A National Governance Association survey (23-09-2022) has revealed the top strategic priorities for governing bodies. Here is why joining BOAT can help governors to address these challenges.



You will note that many priorities are covered by 'Team St Nic's and St Mary's'. Joining the trust means tapping into St Nic's as well as other schools that join in due course. As more schools come on board this pool of expertise will increase.

St Nicolas & St Mary's CE Primary School

St Nic's and St Mary's is the first school to join the trust. It is an award winning school with a strong track record in the arts (Gold Artsmark), sport (Gold School Games Mark) and environment (Green Flag). The current Ofsted grade is 'good' and the last two SIAMS inspections were 'outstanding'. More importantly, parents and children speak very highly of the school: 97% recommend it and 98% say their child is happy.

The school has supported many other schools, particularly at senior leadership level with long-term secondments. The school has also benefitted from the expertise of partner schools and organisations.

The school may be a founding school, but is it not the trust's 'lead-school'. St Nic's looks forward to working with other pioneer schools who are considering joining the trust.

To get a school's perspective on being part of BOAT, please contact:

Julie Searle, Chair of Governors jsearle@stnm.org.uk
Andy Lincoln, Headteacher head@stnm.org.uk



BOAT Builders

Are you an inspirational, innovative pioneer?



Pioneers: Boat Builders

The trust has a committed board of trustees and an experienced local board of governors. We have a small core executive team and an established school leadership team.



We are looking for inspirational, pioneering leaders who want to shape our trust, and support our strategic priorities, as it becomes established. We want school leaders who want to use their expertise and collaborate for the benefit of all. Ambitious leaders are invited to join, drive and shape our new trust. We are looking for schools who are passionate about children and are committed to providing an excellent education embedded with Christian values.

This is not about building a trust central school improvement team, but a school to school improvement system.

We can offer innovative and ambitious heads an opportunity to be collaborative and share ownership in leading the trust's school improvement agenda. The trust want to take an organic and imaginative approach to school and system improvement. We are inviting inspirational pioneering leaders to join us on this exciting journey who are:

BOAT Builders

Our aim is to be a strong trust containing many successful schools, who work together to drive excellent results. We want to see church-school partnership thrive where families have the opportunity to 'know, love and follow' Jesus. We want happy, well-educated children leaving our schools, equipped with 'Wisdom for Life'.

Committed

- To putting children first
- To respecting the differences and uniqueness of other schools
- To a C of E education
- To taking a research based approach

Motivated

- To be a capacity maker
- To collaborate with others and work collegiately
- To strategically but organically grow partnerships

Open

- To be challenged and to challenge others
- To be imaginative, innovative and take risks
- To explore options including becoming an associate school or joining the trust

Partnerships

Our goal is to work in partnerships with others which is of benefit to all and could lead to growth of the trust and the development of a strong family of schools collaborating together. We have started with one founding school but now seek to have a group of 8 pioneer schools with inspirational leaders to shape the trust as we move forward. We will take a four stage approach.

STAGE	WHAT – Partnership working	WHO	WHEN
Stage 1: Proposing	Invite and inspire	Trust and Founding School	November 2022 – January 2023
Stage 2: Pioneering	Imagine and innovate	Pioneering leaders x8	February 2023
Stage 3: Partnering	Collaborate working and projects with a focus on school improvement and potentially some back-office functions	Associate & pioneer schools; Trust/school leaders & admin staff	March 2023
Stage 4: Performing	Making a transformational difference to the lives of children	Associate & pioneer schools	Summer 2023 onwards

Growth

The trust is planning for steady, not rapid, growth over the next few years. We want to build well and not at the expense of the first groups of schools to join the trust. The trust will be working with the Diocese and Regional Director (DfE) to ensure sustainable growth. We also have to consider the capacity of the diocese, local authority and DfE in order to process such growth alongside other trusts.

Over the coming few years, schools may not have the option to simply join whatever trust whenever they like as all trusts will have to strategically plan and prioritize expansion. That is why we are encouraging 8 schools to pioneer with us – and potentially be the first group to join the trust.

The trust has successfully applied for ‘Trust Capacity Fund’ for significant funding to establish the trust and would look at repeating this – particularly if geographical groups of schools wanted to explore setting up a hub.

The table below is a simplified overview of the stages to joining the trust. You will note that it could take 9 months from initial discussions to actually joining the trust so if 8 pioneer schools wanted to join the trust, it could take 2 or 3 years. Non-‘pioneer’ schools could have to delay joining until Autumn 2025.



STAGE	WHAT – Journey to join the trust	WHO	WHEN
A. Founding	Launch the trust	Trust and Founding School	June 2022
B. Informing	Inform governors and leaders about the trust	Trust	From November 2022
C. Discussing	Offer governing bodies the opportunity for discussion	Trust and Governors	From January 2023
D. Consulting	Support governing bodies in consulting with their school communities about whether to join or not	Governors	From February 2023
E. Assessing	Undertake due diligence to check whether the trust and school are a good fit	Trust and Governors	From February / March 2023
F. Applying	Seek the relevant permissions and complete the necessary paperwork	Trust and Governors	From March 2023
G. Joining	Schools join the trust: <i>1 or 2 schools autumn 2023</i> <i>1 school per term thereafter.</i>	Trust and Governors	From Autumn 2023

Goals

Our growth goals, subject to on-going review, are:

- **Short-term (1 year)** Three schools
- **Medium term (2-3 years)** A trust with 6-8 schools
- **Long term, (5+years)** Interconnected hubs with up to 10 schools in each geographical area

We also welcome conversations with geographical groups of schools considering joining as a group or ‘hub’.



What's next?

Our next step is to gather inspirational pioneer leaders to shape and co-lead our school to school improvement work.

The initial ‘pioneer’ working party will meet in January 2023. If you want to be part of this group, or have any questions, please be in touch.

**BOAT
Builders**
Ambitious
Passionate
Innovative
Inspirational
Collaborative
PIONEERS

Chair of Trustees

An invitation



Dear governors and senior leaders

I hope you found the Diocesan Roadshow and this BOAT information pack helpful as you consider options for the future.

We find ourselves at an exciting point in our journey as a **multi-academy trust**.

We have been establishing the trust with a clear vision around Wisdom for Life, Educational Excellence and Community and Partnership.

In June, our first school, St Nicolas & St Mary's CE Primary School, joined the trust and we officially launched as a multi-academy trust.

Our next stage is to welcome other schools to join our journey of collaboration – schools working together with other schools to benefit the education experience of our children.



We are totally committed to supporting schools to provide quality education and care for children. Quite simply, we want our schools to thrive and shine. Everything we do as a trust is for that purpose.

Whilst the trustees have total responsibility and accountability for governance in the Trust, we value the support of local boards to be the eyes and ears of the Trust with a real focus on the education and well-being of the children and engagement with the local community. The Trust will offer direct support for finance, HR, premises, compliance and policies.

Local boards will retain responsibility for supporting the headteacher, the school community and the distinctive Christian ethos.

We welcome enquiries from inspirational and innovative leaders and governors who want to work together to shape the future for the Trust and to navigate the challenges that all schools are facing.

I invite you to not just consider *our* offer, but what you and *your* school can offer our trust. It is about working *together* as a family of schools for the benefit of all of our children.



So, if you would like to be a 'BOAT Pioneer', please be in touch.

Jenny Barnard-Langston
Chair of Trustees

Email: jenny.barnardlangston@boat.academy



Questions

...and answers

If you have a different question, please be in touch!

What is the Bishop Otter Academy Trust?

Our academy trust is an education charity to give children a better future. We are a diocesan school-led trust with a single legal and moral purpose: to advance education for the public benefit.

Who is in the trust?

BOAT trustees have a significant amount of experience, particularly in the education sector. This includes two former headteachers one of whom was a teaching school lead. We have extensive governance experience including a National Leader of Governance and a Local Support Governor. More information about our trustees is available on our website.

We currently have one very experienced local governing body that also provide additional expertise in, for example, HR on top of their normal duties.

Our core team comprises a chief executive, chief finance officer and administrator / governance professional. Our plan is not for a large central staff, but a trust-wide team that draws on the skills of leaders and other experts in schools that join the trust.

The trust has strong partnerships and works collaboratively with other trusts and sector organisations.

Is Nicolas & St Mary's the lead school in the trust?

St Nic's may be the first pioneering school to join the trust – but it is not the lead school. St Nic's has many strengths but wants to learn with and from others. Our vision is for a family of schools who believe in school to school, not top down support.

Why join a trust?

A group of schools working together in a single entity can do many things that are harder for stand-alone schools, or schools in a looser partnership, to do:

- Teachers work and learn together to improve the way they teach.
- Schools share practices that make a difference to the quality of teaching.
- Teachers and leaders can work together on the things that matter – like curriculum and assessment.
- It is easier for teachers and leaders to support another school to help improve the quality of education where that school is struggling – and this work is more likely to be in schools with more disadvantaged pupils.
- It is more possible to be efficient – and thereby to invest money in supporting pupils to have wider opportunities.

Why join BOAT?

We are at an exciting stage of our journey. We've established the basics such as back office functions, systems and communications. Our next stage is to invite pioneers to develop a collaborative framework that drives school improvement and reduces workload. Our destination is to be a group of schools working in collaboration as one entity to improve and maintain those high educational standards.

Money matters – who sets the budget?

In any trust, the board of trustees and the Accounting Officer (CEO) are accountable, in law, for the finances of the trust and all of its schools. However, local governing bodies are responsible for setting local school budgets that meet the needs of their children. Essentially governors can have responsibility to draft the budget but trustees are accountable for approving it in line with DfE requirements.

Myth busting

Academy Trusts are highly accountable

Academy Trusts are held to account to a higher standard than maintained schools. The obligation of transparency and accountability is much greater than maintained schools. They are held to account by the Education and Skills Funding Agency (ESFA), Ofsted and Regional Directors (DfE).

They are required to have an independent audit annually and to publish their accounts. They are also required to disclose pay in thresholds. If the ESFA investigates a trust, the investigation report is published on the government's website. There is no similar requirement on local authorities to publish investigation reports or disclose headteacher pay.

Academy Trusts are part of state-funded education

Like any other state school, academies are free to attend, inspected in the same way, and children take the same tests and exams.

Academy trusts are state-funded – parents do not pay fees. They operate in accordance with their funding agreement with the Secretary of State.

More than half of pupils in England – 3.8 million pupils – are educated in academy schools.

Land is not passed into 'private' ownership and trusts need permission to sell land – just like maintained schools

Academy Trusts can have various tenure types, but most hold their sites on long leases from the local authority, for a nominal charge.

There are controls on the disposal of academy and maintained school publicly funded land. The Secretary of State's permission is required for the disposal of publicly funded school land or school land which has been enhanced at public expense.

Academy Trusts have the same legal responsibilities as maintained schools towards children with special educational needs and disabilities (SEND)

Academy trusts are subject to most of the same direct statutory duties as maintained mainstream schools, in respect of children with special educational needs and disabilities (SEND). As such, mainstream academies must:

- Have regard to the statutory SEND Code of Practice
- Use their best endeavours to make sure a child with SEN gets the support they need
- Designate a qualified teacher to be the SENCO
- Co-operate with the local authority in respect of the child
- Admit a child where the school is named on that child's Education, Health and Care plan
- Ensure that children, young people and their families are involved in decision-making and planning.

Academy Trusts must comply with the same law on admissions as maintained schools

The DfE's model funding agreement for mainstream academies requires them to comply in full with the DfE School Admissions Code and the law relating to admissions.

Academy Trusts are not businesses – nor are they run by 'private' people

Academy Trusts are education charities that are set up purely for the purpose of running and improving schools. Trustees have strict duties under charity law and company law. Trustees hold public office – they do not run the trust for 'private' interest but are required to advance education for public benefit. They are required to uphold the Principles of Public Life.

As education charities, academy trusts are not allowed to make profits or distribute profits to trustees or members. All surpluses are invested into the front-line to improve the quality of education.



Policy Information for all staff



Policy Update

As a trust we have to ensure that all statutory policies are in place. This bulletin seeks to update you about our policies and where you can find them. The policies highlighted in bold may be of particular interest to staff. This list does not include school-level policies like, for example, teaching and learning, or the WSCC policies which were 'TUPE'd' over.

All the following policies are available on the school's intranet and/or a website as indicated in the table below.

Policy / Document	Location	Comment
1. Accounting	Trust website (soon)	This policy outlines accounting expectations (to be approved shortly).
2. Admissions	School website	The trust worked with governors to update this policy. Arrangements for 2024 are currently being consulted about.
3. Appraisal		This is based on the WSCC model policy. Currently it covers teachers but will be expanded to include support staff.
4. Associate Membership		This is for schools who want to enter a formal partnership arrangement with the trust.
5. Behaviour	School web. (soon)	The trust has produced a model policy for schools to adapt to ensure that they meet the latest statutory requirements
6. Behaviour principles written statement		This brief statement sets out the trust's principles regarding behaviour.
7. Capability of staff		This is based on the WSCC model policy and adapted for a trust context.
8. Charging and Remissions	Trust website Click here	This outlines what and how we charge parents e.g. school trips
9. Child Protection and Safeguarding – Trust Policy	Trust website Click here	This key policy includes a statement of procedures for dealing with allegations of abuse against staff and low-levels concerns
10. Child Protection and Safeguarding Handbook		The trust has a handbook with a wide range of safeguarding information and resources and signposts other important documents.
11. Child Protection and Safeguarding – School Policy	School website	Whilst the school must follow trust policy, it must also work in line with the LA's model policy wherever possible
12. Child Protection and Safeguarding – Local Authority Handbook	School website	The LA have produced a handbook detailing local safeguarding information and procedures.
13. Child Protection and Safeguarding – Alternative Provision	School website	This outlines the school's responsibilities for safeguarding children who are in 'Alternative Provision'
14. Children missing education		This is essentially a local authority policy as they retain some responsibility for children missing education
15. Competitive tendering	Trust website Click here	The trust has to have a policy about trust funds are used, getting value for money and transparency
16. Complaints	Trust website Click here	This is primarily for parents and how the school and trust should deal with concerns and complaints.
17. Data Protection inc protection of biometric information	Trust website Click here	We are required to explain how we collect, store and process data.
18. Early Career Teachers (ECTs)		This is the policy for the induction and training of ECTs (formerly newly qualified teachers – NQTs)
19. Emergency Action Plan		Currently this is the school's emergency critical incident action plan – if there is a big disaster or incident
20. Employer Discretions (pensions)		The trust followed union advice, and sought expert advice in this area, to make our arrangements compliant
21. Equality information and objectives statement		The trust and the school have completed an equality statement and wants to ensure more equality between staff
22. Suspension and Permanent Exclusions		The trust updated this policy in line with current legislation and school leaders.
23. External audit contract	Available upon request	The trust is required to appoint an external auditor who is compliant.
24. Finance, Audit and Risk Committee (FARC) - Terms of Reference	Available upon request	This is a subcommittee of the board of trustees and school's finances, receives advice from the risk committee

Sample
Information
sheet for staff

Policy / Document	Location	Comment
25. First Aid		Policy updated by the trust to ensures best practice and compliance with statutory requirements.
26. Freedom of information publication scheme	Trust website Click here	This is based on the Model Publication Scheme from the Information Commissioner's Office about how people can request information .
27. Gifts		The trust outlines how it will give gifts and cards and provides a model for schools to consider.
28. Trustees and Governors' allowance		Here we set out what and how expenses can be claimed by trustees and governors.
29. Health and Safety		An important policy that all must follow. At the moment it remains a school-level policy.
30. HR Handbook		The trust is developing an extensive handbook covering recruitment, induction and other advice.
31. Investment	Trust website Click here	We are required to have a policy – not that we have any investments!
32. Minutes	Trust website	You can read minutes of trustee meetings. They are uploaded onto the BOAT website once they have been approved.
33. Parents code of conduct		This has been drafted by the trust as requested by the school – but has not yet been adopted.
34. Policy on Policies		This gives an overview about how we manage policies
35. Premises management document		We are required to have a policy on premises management
36. Privacy notices	Trust website Click here	We have privacy notices about how we deal with data for different stakeholder groups.
37. Master Funding Agreement	Trust website Click here	This is the funding agreement between the DfE and the trust. It sets out some of the 'rules' that we must follow
38. Memorandum and Articles of Association	Trust website Click here	This is our 'constitution', as agreed between the DfE and Church of England. It outlines how the trust should be run.
39. Register of interests	Trust website Click here	You can find a list of Members and Trustees 'interest's here.
40. Reserves Policy		We need to have some reserves in case of unforeseen expenditure
41. Risk Management		This is our policy on how we manage risk.
42. Risk Register		This details specific risks that the school and trust may face. Risk Assessment for day to day risk are separate.
43. Scheme of Delegation	Trust website Click here	This is a key document about who (trustees, governors, CEO and headteachers) are responsible for what
44. School Information to be published on website	BOAT site / School site	Trust and school websites are required to publish certain information. We use a checklist to ensure that
45. Sickness absence		This policy is based on the WSC
46. Staff discipline, conduct and grievance		This policy is based on the WSC
47. Supporting pupils with medical conditions		This policy has been updated for
48. Trustee & Governor code of conduct		We are required to have a code of conduct for trustees and governors.
49. Uniform		The policy sets out costs, equality and diversity requirements but the school decides the actual uniform colour and style.
50. Union recognition - Model Agreement for Academies		This is our agreement with the unions about how we work together.
51. Whistleblowing	Trust website Click here	This policy outlines how staff can report concerns.

This list is continually being updated

Next Steps

We review policies on cyclic basis but sometimes we have to update policies because of new government requirements. We do share HR related policies with the unions and seek their feedback where appropriate. Staff have a responsibility to follow trust and school-level policies. If you have a suggestion, want more information or training about a particular policy, please tell your line manager or headteacher.

David Etherton

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Want to be a Trustee?

Advert



The Bishop Otter Academy Trust (BOAT) is looking for a new trustee with financial experience. We would like someone who:

-  Cares about children and providing them with an excellent education
-  Will ask challenging questions
-  Has experience of school governance or is willing to learn
-  Can offer financial expertise and scrutiny
-  Is committed to the Christian ethos and values of our trust.

We can offer you the opportunity for personal development, to be part of an exciting project and an influencer on the education and well-being of a growing number of children.

We are a Church of England, school-led Academy Trust, which St Nicolas & St Mary's CE Primary School joined in June 2022. We are now entering an exciting period of potential growth as we seek to welcome other schools into our trust.

Our Vision – Wisdom for Life

The Trust is aspirational for every child to achieve their potential and be equipped with 'Wisdom for life'. We aim to be a mutually supportive community where we strive for transformational educational excellence through effective partnership within and beyond the Trust.

Our three core aims are *Wisdom for Life*, *Educational Excellence* and *Community & Partnership*.



Governance

Our board of trustees is appointed by the Diocese of Chichester and works closely with Local Governing Bodies.

Trustees are responsible for the overall vision of the trust, holding leaders to account for providing excellent education and ensuring that money is well spent.

Our board meets 6 times per year with three or four Finance, Audit and Risk Committee meetings plus occasional training and school visits.

Information about academies, governance and trustees can be found online:

- ❖ www.gov.uk/guidance/academy-trust-handbook
- ❖ www.gov.uk/government/publications/governance-handbook
- ❖ www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3

More information about the trust is available from our website: www.boat.academy

If you are interested, and for further information, please contact:

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