

Value for Money Statement

Academy trust name: The Propeller Academy Trust

Academy trust company number: 8340120

Year ended 31 August 2014

I accept that as accounting officer of The Propeller Academy Trust (PAT), I am responsible and accountable for ensuring that the academy trust delivers good value in the use of public resources. I am aware of the guide to academy value for money statements published by the Education Funding Agency and understand that value for money refers to the educational and wider societal outcomes achieved in return for the taxpayer resources received.

I set out below how I have ensured that the academy trust's use of its resources has provided good value for money during the academic year.

The Propeller Academy Trust (PAT) was operational as of 1st February 2013.

Improving educational outcomes:

As the Accounting Officer, throughout the academic year ending August 2014 I am aware of new initiatives and procedures that have been put in place which have led to an improvement in levels of pupil achievement across the PAT. I can confirm that Headteachers were held to account through a rigorous and effective appraisal and performance management process, linked closely to the needs of the individual school and staff. Leaders and Local Governing Body (LGB) members focused on school improvement setting challenging targets linked to the individual school's SDP. The effectiveness of the systems were regularly evaluated with initiatives in place to further improve rigour and challenge. I have been kept fully informed on all areas of school improvement, performance, financial stability and sustainability of the business by receiving relevant reports from the LGBs prepared for meetings across the PAT.

Targeted improvement:

Focus on Individual Pupils:

Both schools reported on progress of pupils in receipt of pupil premium and published this information on the website. Progress was monitored closely for pupils in receipt of free school meals and looked after pupils. The use of Pupil Premium impacted positively on the achievement of those children in receipt of the funding.

At Kingfisher School, £19343 Pupil Premium was received during September 2013 – August 2014 and its use impacted positively on the achievement of those children in receipt of the funding with 82% meeting or exceeding their targets in CLL/English and 91% meeting or exceeding their targets in PSR/ Maths during this period. All LAC children made good – outstanding progress over the year as a result of bespoke provision specifically designed to meet their individual needs.

Kingfisher received £2500 “Y7 catch up funding” for five pupils which was used to enhance the curriculum offer and meet the specific needs of the individual young people. These pupils took part in activities focused on developing motivation, supporting therapeutic needs, enhancing readiness for and engagement in learning and in developing communication and problem solving skills. This funding was also used to support children who required additional provision to minimise the barriers to learning created by their social, emotional and behavioural needs. These included 1:1 music therapy sessions, where children worked with a trained music therapist who supported the development of their communication skills, and musical skills as appropriate, with a bespoke combination of improvised instrumental music and voice. Visits to Pennyhooks Farm provided a unique experience for the young people who have Autism /Aspergers Syndrome where they had a hands-on experience in the running of a working farm. The activities are designed to support the personal growth and development of the students whilst providing them with appropriate and meaningful work related opportunities.

£8160 was received in Sports Funding and this was used successfully to increase participation rates for children in accessible physical activities and inclusive school sports. Through its use the provision as a whole developed as did the quality of teaching and learning in PE and School Sports.

At Fitzwaryn School, £18844 Pupil Premium was received during September 2013 – August 2014. This was used effectively to raise attainment by providing an additional teacher and teaching assistant to support individual interventions based on need in Communication, Literacy and/or Numeracy and any necessary additional resources. Pupils in receipt of Pupil Premium were able to access extra-curricular activities which are chargeable, and several used this entitlement to pay for Residential activities. The impact of the pupil premium was that all pupils receiving the allocation made progress at least in line with similar pupils at School. In particular the pupils whose Communication and Literacy skills were being targeted made progress in other areas of curriculum and social development over the course of the year. A detailed analysis of the impact was carried out by the Senior Leadership team and analysis of progress 2013/2014 showed that overall progression in English and Maths was outstanding, and in line with the progression of all pupils in school, towards the outstanding end of Key Stage targets set internally.

£8501 Sports funding was used effectively across the primary phase and enhanced Teaching and Learning opportunities for all pupils. Best value has been secured by working in partnership with other local schools and an Action Plan for use of Sports funding was securely in place. The funding was analysed at the end of the summer term 2014 in terms of impact on pupils.

Year 7 catch up funding of £2000 was provided for four pupils in year 7 in the academic year 2013 – 2014. This funding was used on In-service training for staff. Les Staves delivered 2 days of workshops with classes, individual pupils and newly qualified teachers. He also ran a staff meeting which allowed all staff time and resources with which to enhance their skills. LGB members also attended the meeting to give them greater knowledge of day to day class room practice.

Through the WASPS (Wantage Area Schools Partnership) the School has had further training in enhancing writing skills through ‘The Big Write’. Funding provided for staff to

meet with colleagues in other schools (mainly primary) to share good practice and learn new skills, which in turn were used to promote better literacy skills in the classroom.

The overall progress in both English and Maths is outstanding for all four pupils, over the year in their progression towards the outstanding end of Key Stage targets set. Deeper analysis of the four strands in each subject have enabled staff to focus their target-setting for next year.

Both schools place a high value on this extra funding for supporting extra-curricular provision and results show those children in receipt of this funding benefit from these activities.

Collaboration

Kingfisher and Fitzwaryn Special Schools together with Abingdon and Witney College (AWC) have established a formal relationship through the creation of a multi-academy trust. Each entity is independent as to how it manages its day to day operations in delivering its objectives, however this is monitored by the Board of Trustees who have the responsibility to ensure the outcomes of the Trust as a whole are achieved.

Peer monitoring and sharing of good practice in which I have been a part, has taken place across the PAT during the last year. This has led to a broadening of professional dialogue and learning relating to the shared vision for the Trust and practice within the settings. This has informed the Trust Development Plan and PAT vision.

By carrying out joint lesson observations, I have taken part in moderation across the PAT which has provided the opportunity to review each other's judgments and engage in professional dialogue on quality learning and teaching. This has served to improve the quality of feedback and subsequent practice within both schools. Underperformance at all levels has been challenged and appropriate measures taken to support improvement and hold individuals accountable for the quality of their delivery.

The curriculum opportunities offered to the children at both schools have been enhanced by the use of shared resources across the PAT e.g. the swimming pool at Kingfisher ; the Sensory Theatre at Fitzwaryn, The Propeller Project at AWC which incorporates a horticulture strand at Common Leys.

During the conversion to the PAT, AWC provided much needed Admin, H & S and Finance advice and had a significant role in the appointment of the Business Development Manager (BDM). With this post in place as of 1st September 2013, both schools have enjoyed a consistency of approach in financial, HR and premises management which makes the provision for employees within the PAT more equitable. Shared teams have developed which have resulted in efficiencies of scale and financial savings. At times of significant pressure in either school, members of the teams have been able to support each other along with personnel from AWC offering support e.g. the Health and Safety lead from AWC advised on H&S matters.

The BDM has also embedded a consistent approach to managing staff absence and this has been a focus across the PAT, mindful of the impact poor attendance has on provision and value for money. Poor attendance has been challenged and a proactive approach to supporting staff well-being has had a positive impact.

New initiatives

With the appointment of the new BDM in September 2013, new initiatives were put forward to improve specific areas of Health and Safety. All pupils have a statement of Educational Need and many have complex medical needs which make the use of the traditional fire drill evacuation procedure inappropriate, placing the more vulnerable pupils at unnecessary risk. At Fitzwaryn it was possible to re-configure the alarm panel to zone the school site for a phased evacuation plan, at a minimal cost. However the panel at Kingfisher could not be re configured. As a consequence, an application was successfully submitted to the Academies Capital Maintenance Fund (ACMF) for this and other safeguarding works and Kingfisher was awarded £100,300 in April 2014. This change of approach to fire procedures has had a significant positive impact, and classes determine whether they will evacuate outside or for the most vulnerable, whether it is preferable to stay inside and move to a safe zone within the school. The project also installed fob entry access to allow secure and easy access to classrooms. Doors release in the event of fire and door sensors improve wheelchair and disability access. This has had an immediate high level positive impact on staff and pupils. The security of the site in general has greatly improved and pupils are unable to leave or enter a classroom without permission. This has decreased the number of interruptions and increased control of movement around the school.

Financial governance and oversight

The Board of Directors is in an early stage of development as is the role of Accounting Officer. I have attended all the PAT Board meetings and PAT Finance and General Purposes Committee meetings in this period. I have received all the minutes from the LGB meetings of both schools together with financial budget monitoring reports and cash flow updates from the BDM.

I was present at the Fitzwaryn LGB Meeting 2nd June 2014 and the PAT Finance and General Purposes Committee meeting 30th June 2014 when the proposal was put forward by the BDM to merge the two LGB Finance committees. From Kingfisher Finance minutes of the 24th June, I was able to confirm that the same proposal had been put to the Kingfisher governing body who agreed to a one-year trial. The proposal was approved at the PAT Board Meeting 8th July. The formation of the school budgets had acted as a catalyst for the BDM in putting forward this proposal. The BDM suggested it was important for both schools to understand each other's issues, not least because of how they could impact on either school and the sustainability of the PAT as a whole. I agreed that merging the committees would double the membership without making it unmanageable and would also increase scrutiny, debate and expertise and sharing of ideas, providing a much broader, robust group of members.

Purchasing

I have met with the BDM to discuss opportunities for joint purchasing across the PAT to ensure "Best Value". A joint membership was procured for a training database "Smartlog" (£250 per school) which provided the whole staff with a variety of online H&S based training. This has provided a highly effective method of training on a whole school basis at a minimal cost.

Further opportunities have been taken on occasions to take advantage of being part of either partnership in Abingdon and / or Wantage to secure the best price and we have used that collective bargaining to secure more competitive rates for services such as buying into a premises management service "Strictly Education". Both schools used this service to source quotes for work over £1000, and by using this service, have had assurance that the correct checks and references have been carried to ensure quality workmanship and best value. The use of this service also frees up PAT staff to continue with other tasks rather than spending time sourcing quotes for work.

Towards the latter part of the year, there has been a growing awareness of the opportunities to re-negotiate services and contracts and every opportunity is now taken to purchase as the PAT and not on an individual school basis in order to secure the very price and quality. The Finance team put forward the proposal to move to a new finance database PS Financials (PSF) moving away from SAP. The BDM secured a £4000 reduction in costs negotiating the benefit to PSF of the PAT being the first special needs multi academy trust to be using PSF.

Due to the specific nature of the children's needs across the PAT, at times purchasing is limited to one or two suppliers where there are specific equipment needs that are essential to the child's development. It is important to follow recommendations from the therapists that work with the children and their families.

During this period, both schools utilised the same cleaning contract, Regency, which is soon to be retendered as a PAT cleaning contract. The BDM has been working with the academy network to source a new payroll provider.

Benchmarking

It is difficult to benchmark income and expenditure as it has been difficult to find similar organisations to benchmark against. There are very few large special schools that are also academies that have a range of ages, the complexity of needs of our pupils and the variety of additional activities that we undertake across the PAT. This is an area for development. However the BDM did carry out some benchmarking by approaching schools directly to request numbers of pupils and categories of need in order to make comparisons.

Income Generation

The PAT does encourage income generation from letting school facilities. Letting rates are decided at local level taking into account the nature of the letting and often provide a quality service specific to the children with SEN and therefore as well as generating income, outcomes in terms of learning are achieved through these opportunities. The PAT also sees supporting such activities as engaging with the community as a whole and broadening the core offer.

Both schools benefited from donations during this period. Kingfisher received £5000 from Radley College for a specialist changing bed. Fitzwaryn received a variety of donations, £100 from the Methodist Church, a local golfing group donated £100, and an ex pupil ran a marathon and donated £200.

Reviewing Controls and Managing Risks

Working within the constraints of the formula funding, value for money has remained the driver based on a review of admission numbers and future forecast. I have received Budget Monitoring Reports and have been present at committee meetings at local level

and at Trust level where these have been scrutinised on a regular basis as has the cashflow of the PAT. Where spending had deviated from the original budget allocation it was challenged for an explanation. Accuracy of spending informed the formation of the new budget 2014 /15.

Introducing a system of submitting budget bids ensured spending and resources were in line with priorities for school improvement within the School Development Plans. The PAT implemented the Risk Register from the Financial Directors Forum Executive and established review of the Risk Register as a standing item on the Audit Committee agenda of which I am a member. The Responsible Officer has commented on the quality of the Register and the significant advancement of the PAT to identify and manage risk.

Prudent financial management also insisted on producing a 3 year budget forecast which quickly identified whether either school would remain a “going concern” and therefore whether the PAT as a whole would remain financial stable. I am aware that the principal risks faced by the PAT are:

Financial Risk - *“insufficient funds to deliver services to the appropriate level owing to a significant change in top up funding from the local authority for pupils with SEN”*. An action plan has been formulated to attempt to mitigate this risk; To date, two Directors have met with the local authority to ask for a review of the new formula with regard to Kingfisher School which has a higher than average pupil profile consisting of significant medical and complex needs. The further risk that *“the academy receives inadequate funds to meet real costs”* continues to remain high risk as the single flat rate per pupil top up regardless of need has been implemented across Oxfordshire and the local authority have made it clear that there is no immediate intention to review it.

Performance Risk - that *“there are insufficient staff or resources to deliver services to the appropriate level”*. The implementation of the flat rate local authority top up pupil allocation has impacted significantly on Kingfisher in particular and necessitated a 25% reduction in teaching assistant hours to support pupils in the classroom in order to produce the new budget. To produce a 3 year projection, further cuts to staffing were necessary, although I have concerns that this might not be viable in practice.

As of the 31st August, I can confirm that the PAT held a healthy cash balance at the bank. However as a member of the Audit Committee, I raised concerns that Fitzwaryn School’s position must not be weakened and placed at risk to support Kingfisher School. I have taken part in discussion with reference to a PAT Reserves Policy, which I believe would offer a minimal support, but not a long term resolution. I am supportive of the Directors’ challenge to the LA, by seeking external authentication to confirm the suitability of provision at Kingfisher School.

Together with other Directors and LGB members, I have reviewed policies and other key documents which are linked to the individual risks within the register and these helped to evidence how certain risks have been mitigated. This has also ensured a continual review of policies and procedures and a consistency of good practice.

Risk Management is an integral part of daily life across the PAT and teaching and support staff are confident in producing risk assessment together with applying them and recognise how this aids delivery of quality service to the pupils. Health and Safety of

pupils and staff is priority and at the last Health and Safety audit where practice was found to be outstanding (September 2014) it was confirmed that the local authority has been using the PAT Health and Safety policy as an example of best practice to new academies who need to implement the policy.

My understanding, along with the understanding of Directors and LGB members of the importance of the Risk Register and its financial implications has increased.

The PAT operates using the four best value principles of Challenge, Compare, Consult and Compete.

Challenge:

I am able to evidence that the Local Authority was made aware of the challenges faced by Kingfisher School under the current Oxfordshire funding formula and the difficulties encountered in forming a realistic and sustainable budget. Discussions with the Local Authority continued during July and August seeking resolution to improve financial sustainability. However, the position had not been resolved as of the 31st August 2014. With release of the 2014/15 funding papers in February 2014, a significant amount of time during the spring and summer terms was spent working on the formation of the new budget for 2014/15 reviewing numerous staffing scenarios, keeping value for money in mind at all times, with a particular focus on provision for pupils in terms of Health and Safety as well as an enriched curriculum and educational experience.

Compare: Special School Headteachers participated in a strong network OASSH (Oxfordshire Association Special School Headteachers) which met regularly to review the provision across the county. As a member of OASSH, I worked with the other headteachers to develop and improve opportunities, standards and provision for young people in special schools in Oxfordshire as well as to support provision in mainstream settings too. This provided a forum for communication between the Headteachers of the county's special schools and has facilitated the sharing of good practice.

Consult: As a member of the PAT Strategy Group which initially met in January 2014, I recognised that the PAT Development Plan was evolving during this period and required consultation with a wide range of stakeholders to inform future planning.

Compete: Contracts and purchasing commitments were made using the principles of competition in the Academy Financial Handbook and the PAT's Scheme of Delegation. The Financial Manual of Guidance Procedures was adhered to and a quarterly audit by the Responsible Person ensured compliance together with suggesting actions for improvement where necessary to ensure best practice at all times. Levels of authority for employees making financial commitments were set out clearly in the Scheme of Delegation and the Financial Manual of Guidance.

Monitoring Processes: The principles of Best Value supported and influenced all management and decision – making activities including:

- Setting targets
- School Improvement planning
- Allocation of resources to identified priorities within the SDP by ensuring budget planning is directly linked to the SDP.
- Scrutiny by members of LGBs: monitoring and reporting of the quality of provision in terms of teaching and learning for all pupils and through analysis of

performance data set against similar schools locally and nationally. The self-evaluation framework assessed the provision within each school to be “Outstanding” in Fitzwaryn and “Good” in Kingfisher. These judgments were verified by Ofsted during the autumn term and are further evidence of Best Value across the PAT.

Signed:

Name: Stephanie Coneboy

Academy Trust Accounting Officer

Date: 31st December 2014