



St Chad's
Academies Trust

Charging Policy

Children first; in the footsteps of St. Chad

As we follow Christ in the footsteps of St. Chad, we seek to be servant leaders who have a desire to see all those, within our Trust family, truly flourish both spiritually and academically.

Document title	Central Fund Charging Policy		
Owner	HR Operations		
Version	1.0	Status	Draft
Approved on	Pending	Effective from	Pending
Last updated	Pending	Last updated by	Zoe Heath
Review date	Pending		
Purpose	<p>The central fund is maintained for the purpose of running the central function of St Chad's Academies Trust and to provide a range of services and support for the academies within the Trust, which are necessary to operate effectively, efficiently, economically, with an emphasis on developing the capacity of leaders at all levels, focused on continuous improvement of our academies.</p>		
<p>The policy has been implemented following discussion with central team service leads and St Chad's Academies Trust Board, and may be amended from time to time, following further review and refocus by St Chad's Academies Trust Board.</p>			
Related Documents	St Chad's Due Diligence policy		
References	Not applicable		

If you would like this information in another language or format, please speak to the Trust.

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Abbreviations

AIP	Academy Improvement Plan
AIS	Academy Improvement Strategy
ATH	Academy Trust Handbook
DD	Due Diligence
DOF	Director of Finance
DCEO	Deputy Chief Executive Officer
DPO	Data Protection Officer
ESFA	Education & Skills Funding Agency
FAO	Financial Accounting Officer
FOI	Freedom of Information
FMS	Financial Management System
GAG	General Annual Grant
GIAS	Getting Information about Schools
HRO	Human Resources Officer
HSE	Health and Safety Executive
LAC	Local Academy Committee
LGPS	Local Government Pension Scheme
PFI	Private Funding Initiative
QLNM	Quality Learning Network Meeting
RD	Regional Director (DfE)
SAR	Subject Access Request
SCA	School Condition Allocation
SEF	School Evaluation Form
SIA	School Improvement Advisor
SIAMS	Schools Inspection of Anglican & Methodist Schools
SSIP	Senior School Improvement Partner
TPA	Teachers Pensions Arrangement
TUPE	Transfer of Undertakings

Introduction

St Chad's Academies Trust ('the Trust') is committed to ensuring that it provides a strong infrastructure to enable our academies to flourish and improve. The Trust recognises that its leaders and colleagues are central to this success and greatly values their commitment and contribution.

The core values of the Trust form the basis of all discussions with colleagues. We expect all colleagues of St. Chad's Academies Trust to respect and model these values.



1. The Central Fund

The benefits of working as a multi-academy Trust are well documented in terms of sharing expertise, economies of scale and shared services. Membership of St Chad's Academies Trust will give academies in our family access to a range of support and services, to enable school leaders to primarily focus on providing high standards of education for the children in our Trust.

To achieve this the charge to academies joining the St Chad's Academies Trust in total is **5%*** of the academy GAG funding only. Specifically, the pupil premium, early years, high needs and any other-directed specific funding will not be included within the central fund calculation. The top slice includes an element of recharges which previously would have been recharged on top of the original top slice. The rationale for this change is that it streamlines the process and means there are no additional recharges added. It also includes a **0.5%** Capital charge to enable the statutory and reactive maintenance to be carried out across the estate.

*The charge is reviewed periodically to support the longevity of the service provision, ensuring it remains realistic and viable. Assurance is provided through Trust led due diligence and market research within the sector, supported by the annual publication of the Kreston Reeves Academy Benchmark report. This report provides a valuable insight into the current financial position of academy trusts across the UK and the

challenges facing the education sector.

This creates several benefits for the Trust including but not limited to the following:

- School improvement
- Curriculum development, data and professional development.
- Governance
- Financial Services and packages
- Payroll and pension administration
- HR services
- Facilities and Estates management
- ICT support (additional charge)
- Health and Safety
- Compliance and data protection support and advice

St Chad's Academies Trust provides a comprehensive support service enhanced by dedicated, highly skilled and knowledge professionals with many years education sector specific experience, ensuring the Trust and academies continue to understand and ensure statutory obligations and compliance are met, whilst enabling our academy leaders and colleagues to focus on delivering the best education possible to our children and communities. Please see Appendix 1 – Meet the Central team. This appendix contains a brief overview of the roles and responsibilities covered by the central team, and acts also a guide to where you should direct your query.

The central contribution will be reviewed periodically to ensure that it continues to meet the needs of each individual academy and supports a cost-effective and sustainable future for the organisation.

Throughout this policy, the Trust academy leaders are asked to:



Future Trust strategic areas of development.

Effective IT infrastructure is crucial for the smooth operation of any organization. At St. Chad's, we recognize this importance and have developed a comprehensive IT strategy to be implemented over the next six years (commencing September 2024). This strategy includes securing service providers across all our sites, achieving the Cyber Essentials certification for enhanced security, and procuring standardised IT platforms to support learning.

Additionally, we are committed to upgrading our academies' infrastructure, including the installation of CAT 6 cabling, to ensure they are equipped to support the latest technologies. This is not an exhaustive list, but these are essential steps to ensure we can effectively support the children within our Trust.

The Trust is currently further investigating branding and how to enhance the first impression, effectively support Trust growth, staff recruitment and retention, and improve pupil admissions.

In the academic year 2024/2025 the Trust will be completing a brand audit to highlight areas that can be developed and focused on to attract more pupils and new recruits. It is the Trust vision, the audit would shape a marketing strategy which can then be cascaded to other academies within the Trust, promoting a consistent brand message.

The Trust recognises the brand is reflected in everything we do; both the obvious and not so obvious, which is a vision we will strive to develop, embed, and evolve across the Trust.

2. School Improvement

- Academy Improvement / Outcomes / Data Progress review meetings with the School Improvement team led by the Deputy CEO
- Regular school visits and support from School Improvement Partner to offer support to address priorities
- Access to School Improvement team for support, advice, and CPD opportunities
- Access to our team of subject experts and other outstanding teachers and leaders.
- Teaching & learning development and support
- Professional learning networks (Quality Learning Network Meetings QLNM) for subject/phase leaders and teachers:
 - English
 - Mathematics
 - Inclusion
 - Science (led by Dr Jenny Watson)
 - Religious Education
 - Including other non-core subjects, as determined from time to time by the School Improvement Partners.
- Head of School/Deputy Head Teacher development programme and pathways
- Ongoing updates through Trust managed Leadership Catch ups once a month
- Ongoing CPD through Principal Forums/INSET (termly)
- New principal induction and buddy link (mentor)
- Peer and external reviews
- Annual Pupil Premium and SEND review or health check on request
- Quality assurance of SEF and AIP; support with SEF and AIP drafting (templates provided)
- Annual Standards Review with MAT support plan as required
- Support with OFSTED inspections
- Colleague secondment and career progression opportunities
- High quality external support
- Access to support through the Academy Improvement Strategy AIS

2.1. Diagnosis

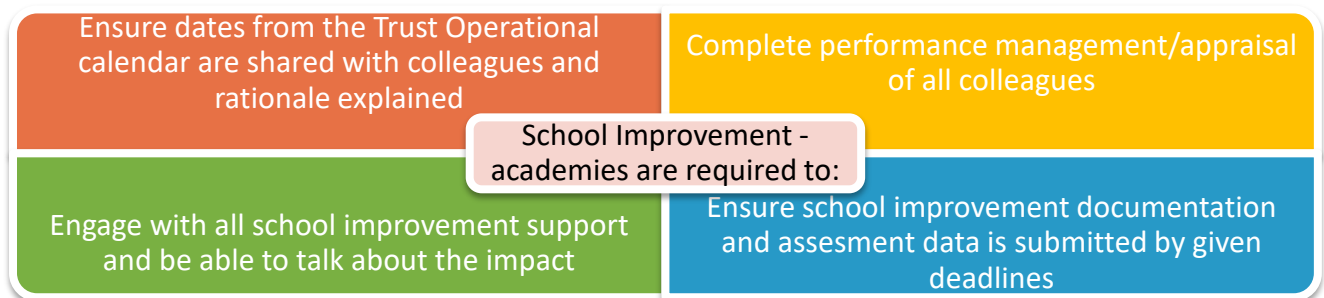
- Internal, peer, and external reviews (Ofsted, SIAMS, Pupil Premium etc.)
- Quality assurance of self-evaluation
- Data analysis
- National comparisons
- Impact of the curriculum
- Pastoral support
- Attendance data

2.2. Interventions:

- Trust wide moderation leading to agreed standards across all aspects of teaching and learning
- Specific intervention strategies for academies, where needs are identified in line with AIS; intensive support framework

2.3. Delivery for improvement

- Effective working relationships with DfE and RD to inform policy and strategic planning
- Leadership development
- Coaching
- Talent management and succession planning
- Staff deployment
- Quality Learning Network meetings.
- Subject Networks
- Year Group Networks
- Peer to peer support



2.4 What is not included?

- DC Pro Tracking system used for data analysis and reporting. This is sourced through the Trust to achieve economies of scale, but is funded by the academy budget
- The Trust has a service level agreement with the Diocese of Lichfield for the Christian Distinctiveness Advisor service, achieving economies of scale, for the academies. Details of the Christian Distinctiveness offer can be provided, on request, from the School Improvement team.

3. People (including Payroll & Pension provision)

- Full access to unlimited resolution focused HR advice and support with HR matters including access to our approved suite of HR policies and procedures, forms and template letters resource including training resource (policy launch programme).
- Full access to a nominated HR Officer, who can support with complex casework and investigation support
- Due diligence support for TUPE consultations (change of service provider)
- Support academies through sourcing external support to maintain independence and impartiality in process, where applicable.
- Assistance with academy-based recruitment (teaching and support); job evaluation/descriptions and recruitment packs, as required.
- Support with In-tray exercises, aptitude tests, productive thinking, and psychometric assessment tools
- Support with advertisements through local and national providers i.e., Trust and Diocesan website, LinkedIn
- Advice on performance management, capability and staff profiling (restructure, reorganisation, and redundancy)
- Management catch-up meetings with academy senior leaders
- Advice on changes and updates to employment law and any new government initiatives
- Production of contracts for colleagues within the Trust
- Letters produced on behalf of the academy relating to:
 - Un/Conditional offer letters (subject to)
 - Acting up/honorarium
 - Notification of leavers
 - Maternity, paternity, adoption, and shared parental leave
 - Unpaid leave, lost pensionable pay
 - Sick leave entitlement notification
- Union consultation through Trust JCNC (Trade Union Recognition Agreement)
- CPD through Leadership catchups and Principal INSETS and Policy Launches
- Training provision will be provided on HR related subjects, dependent on need, including the Trust HRMS for designated personnel
- Monthly business professional forum post payroll processing to manage issues/matters arising.
- Academy secure access to Trust HRMS system for reporting.
- Colleague Self-service portal access through HRMS; access to payslips, P60, personal information, as well as authoriser self-service.
- Monthly/annual calculation, processing, monitoring and submission of the following contractual requirements:
 - Tax (including tax code updates, FPS (Full Payment Submissions) and EPS (Employer Payment Summary) to HMRC and tax year end; P60 production)
 - National Insurance contributions
 - Student loans
 - Unions (DOCAS)
 - Attachment of Earnings/Court Orders
 - Salary sacrifice schemes.
 - Other voluntary deductions, subject to agreement
- Calculate salary transactions in line with national and local pay policies, as applicable, in line with

current legislation including:

- Starters, multi positions, transfers, and leavers
- Pay awards and increments
- Contractual changes
- Overtime, timesheets for casual employees, KIT days
- Unpaid leave, strike action, and public duties, in line with Trust policy
- Structure amendments and allowances
- Claims and expenses
- Full retrospective backdated payments
- Final payments to employees – holiday pay, PILON
- Payments after leaving
- Redundancy and settlement agreements
- Calculate and process the following absence schemes:
 - Maternity including SMP
 - Paternity including SPP
 - Adoption including SAP
 - Shared Parental Leave SHPP
 - Sick including SSP
- Production of payroll; payment of payroll, pensions and other external bodies i.e., AER, HMRC (Real Time Information RTI)
- Management of emergency payments made in exceptional circumstances only, subject to prior agreement (there may be associated costs levied at the academy – case by case basis)
- Auto enrolment regulations, administration, and declaration.
- All legal monthly/annual returns and submissions for employees within the Trust for administered pension schemes through pension systems in place. Including ad hoc requirements; ill health retirement, flexible retirement, opt out, certificate of reemployment
- Annual pension health checks
- A biennial HR audit from internal auditor with report and action plan, including an internal annual review, monitoring or inspection
- Absence management and guidance
- Occupational health provision covering referrals and reviews
- Apprenticeship levy administration, advice, and guidance
- Periodic completion of Office of National Statistic returns
- Work collaboratively across Trust disciplines to ensure consistency in practice
- Annual completion of statutory reporting to government on gender pay gap, provisions in place for development of ethnicity and disability pay gap annual reporting

Adhere to deadlines and procedures

Follow standard HR policies and procedures and use templates provided

People - academies are required to:

Follow policy guidance and seek support from designated HR officer for complex matters

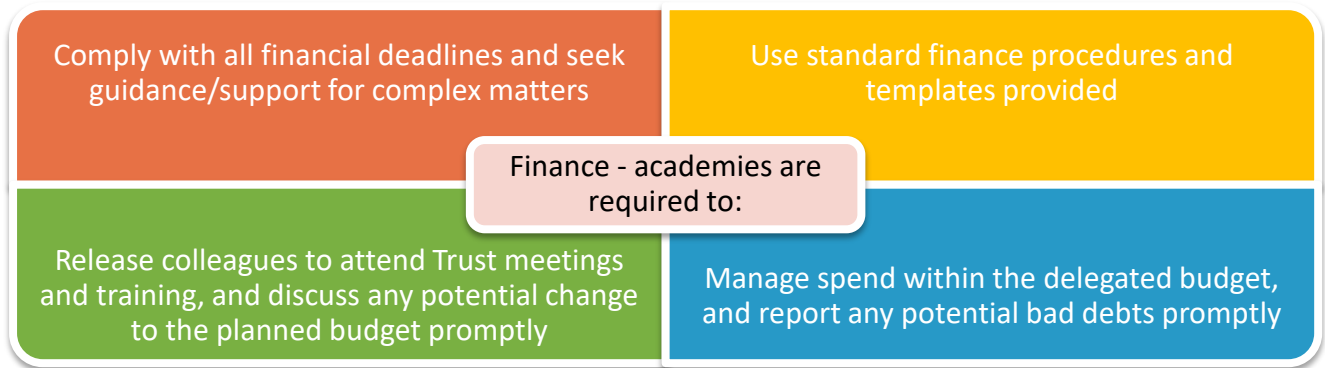
Release colleagues to attend Trust meetings and training

3.1 What is not included?

- Financial advice on pensions (signposting to LGPS and Teachers Pensions provided through Financial Wellbeing policy/ Trust Wellbeing booklet)
- Disclosure and Barring Service (DBS) checking - this is facilitated through a third party but administered by the Trust. Economies of scale are achieved through the Trust contractual arrangements.
- Advertising through other providers, this is managed at local level.

4. Finance

- Access to advice, guidance, and support from the central Finance team
- Advice on compliance with the Academy Financial Handbook and the MAT's financial procedures
- Support, guidance, and review visits with delegated Financial Accounting Officer
- Statutory ESFA returns completed on your behalf which include
 - Budget Forecast Return BFR
 - Annual accounts return
 - School Resource Management Self-Assessment checklist
 - Month end and year end procedures
- Advise, guidance, and structure for month and year end procedures
- External audit co-ordination, agreement of audit plan and production of MAT Financial Statements and Annual Report
- A biennial internal finance audit - management of service and costs
- VAT returns, completion and liaison with HMRC
- Consolidation of monthly management accounts for Finance, Risk, and Audit committee and Trust Board reporting, respectively
- Bank co-ordination and set up which include:
 - Local academy bank account
 - Online banking set up
 - Purchasing cards
 - Management of Direct debits (as appropriate)
- Training and administration of Finance System and Budgeting systems
- Production of Trust-wide finance regulations and procedures which reflect requirements included in the Academy Trust Handbook circulated annually by the ESFA
- Production of the financial delegated authority
- ESFA funding co-ordination and processing
- Financial reports, includes annual performance review and regular financial overview report in line with Financial Improvement Strategy
- Budget setting guidance and support
- Analysis of financial risk linked to risk register
- Oversight of insurance guidance and co-ordination
- Capital asset register
- Termly Business Professional meetings to provide opportunities for training and networking
- Drafting and submission of the annual budget
- Monthly budget reviews with the Financial Accounting Officer
- Training and support of any future financial procedures and updates
- Annual operational timetable for finance and HR processing deadlines



4.1 What's not included but required (local level)

- MIS co-ordination of transfer of license on conversion to academy status
- Workforce and pupil census completion
- Statutory information for website; sports premium and pupil premium strategy statement
- Co-ordination and regular processing of supplier payments via our purchase ledger
- Local asset management

5. Procurement and organisation of the mandatory services

5.1. Contract Services

- Access to contacts and procurement support to create a clear picture of current procurement practices and provide advice on opportunities
- Access a range of preferred providers/contract supplier for key services across the MAT; supply agency, ESPO framework,
- Tender and quotation management for contracts shared with other schools
- Access to procurement savings via the MAT group agreements; MIS, HRMS, finance systems and safeguarding
- Energy (currently under review)
- Central register of leases and contracts
- Contract negotiation and contract procurement
- Legal Services:
 - Employment and staffing matters
 - Data Protection and Freedom of Information
 - School Leadership Support
 - Charity law
 - Governance and company secretarial support
 - Pupil and Parent issues and complaints
 - Safeguarding
 - Property and construction
 - Academy Conversion and Transfers

5.2. What's not included:

- Creation of a strategy for each commodity (books, printing, etc.) to establish bulk buy savings and quality improvements for each key area of spend
- Service level agreements and regular meetings with key suppliers to continuously improve quality

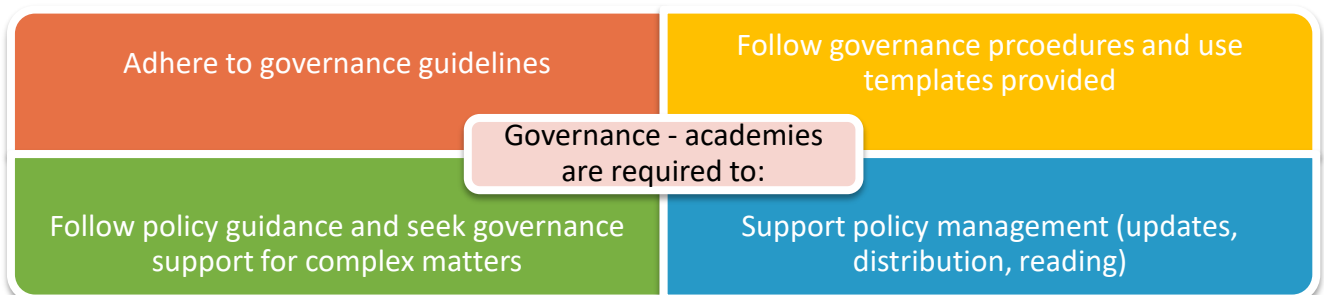
and drive down costs

5.3. Mandatory Services

- All audit fees and charges-e.g. statutory financial audits, Teacher Pension audits (including End of Year processing), internal audits (both financial and non-financial etc.)
- All payroll charges, other than late fees/faster payments
- All standard bank fees and processing costs
- All HR costs (except where independent support is required to maintain impartiality)
- All training costs associated with operating the financial, budget, compliance, safeguarding management systems
- Costs associated with any additional external financial support (case by case basis, other than where independent support is required to maintain impartiality)

6. Governance

- The oversight of the main Trust Board, who take the legal and statutory responsibility for the Trust and its academies
- Support and guidance through the conversion process (governance aspects and legalities); refer to Due Diligence policy for more information.
- Support the maintenance of the Scheme of Delegation for all aspects of the Trust
- HR support for issues related to staff performance and other matters
- Leadership of the Principal's appraisal process
- On-going academy improvement support for the school (see separate guidance under School Improvement)
- Access to the Trust's Governance Professional and Company Secretary
- Regular Chairs' meetings with the CEO and other Trust central team colleagues, as part of training and development programme
- Access to Trust email addresses, SharePoint and website
- Annual Trust-wide information and training events
- Use of the Trust's agreed policy framework including maintenance of GIAS
- Meeting schedule, agenda, templates and minute templates
- Access to local training and development opportunities
- Annual completion of returns relative to governance within the Company Secretary role and remit
- Trust representation on Local Academy Committee (to consider skills set requirements)



7. Safeguarding

- The support, advice, and guidance of the Trust Designated Safeguarding Leads; operations and curriculum specialisms
- MAT safeguarding statement, policy and strategy
- An annual training and networking programme
- Supervision opportunities for DSL/DDSL
- Advice and guidance on academy's single central register, providing updates and support where necessary, through CPOMS system
- Support in dealing with allegations against staff (joint approach with HR support)
- Access to St Chad's Trust policies, procedures and guidance through Smart Log
- Guidance on accessing mandatory training for both academy colleagues and Local Academy Committee members LAC
- Access to online awareness training for LAC members
- Biennial safeguarding internal audit by led by Trust safeguarding specialists.
- Central collation and analysis of safeguarding data through CPOMS reported to Trust Achievements Committee for monitoring and accountability
- Support for safeguarding administration jointly managed with HR in line with employment practice



7.1 What is not included

- Biennial safeguarding audit by external safeguarding lead is conducted to support moderation and external scrutiny of the provision, demonstrating appropriate and reasonable levels of external scrutiny. Costs associated are subject to negotiation with the external provider, to seek value for money.

8. Estates and Facilities

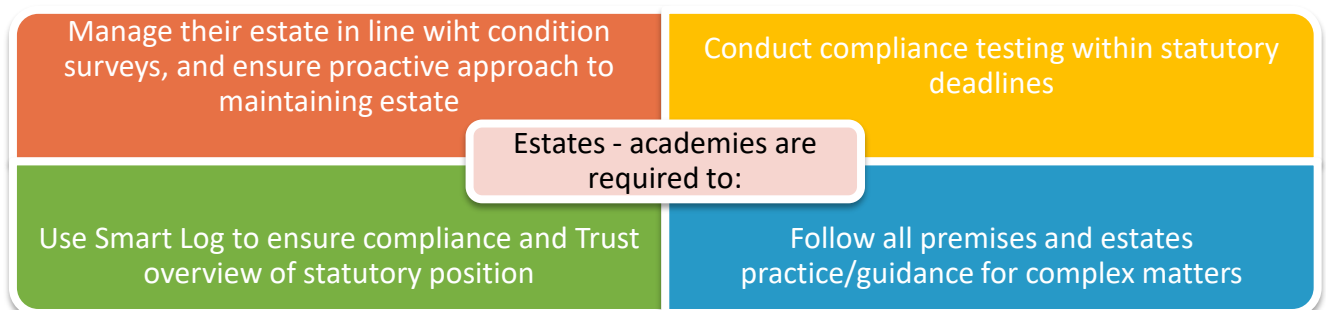
8.1. Initial start-up on joining

- Information, advice and support during transition to academy and initial compliance audit

8.2. Estates

- On-site and by phone support
- Land and Buildings Collection Tool return
- 5- year condition survey to support estates condition strategy
- Capital Maintenance and improvement plan for each site supported by SCA allocation
- SCA allocation managed by Estates working group (comprising Exec-/Principal representation)
- Capital spend survey return for SCA funded projects
- Tendering and project management for SCA projects
- Preferred estates partner for management of building works
- Assistance with ESFA data collection surveys

- Assistance with Emergency Planning
- Safe minibus use guidance, as required
- Asbestos management plan reviews and recording; Smart Log
- Assistance with Cleaning, Catering & other Estates contract management and procurement, as applicable
- Assistance with facilities and estates management recruitment; job evaluation/descriptions and recruitment packs, as required
- Estates monitoring check lists (statutory) through Smart Log
- Assistance in the event of plant or building failure
- Assistance with major project planning – significant change support and liaison with relevant bodies; DfE, ESFA and local Authorities
- Assistance with Budget planning
- Development and management of sustainability programme
- Compliance tracking
- Advice on community use of facilities/lettings including policy and charging rates



8.3. What is not included?

- 5-year property valuation (for insurance purposes); earlier if major property works carried out

9. Health & Safety

- Access to advice, guidance and support via e-mail and telephone from Trust Compliance Officer
- A biennial health and safety audit from internal auditor with report and action plan, including an internal annual review, monitoring or inspection visit
- Support visit to assist the educational establishments to manage health and safety risks in areas such as risk assessment reviews and any other 'bespoke' support
- Access to health and safety policies, guidance, checklists and model risk assessments
- Support with accident/incident management and reporting, guidance and support with RIDDOR reporting, liaising with the HSE where required.
- Model Health and Safety policy
- Advice on educational visits through Trust Compliance Officer including reporting to Trust Board, as applicable
- Fire Risk Assessment (Trust wide procurement opportunity)
- Access to training for Health and Safety through Smart Log:
 - Risk Assessment
 - Asbestos Awareness

- Fire Awareness/Warden
- COSHH Awareness
- Health and Safety at Work
- Legionella Awareness
- Manual Handling
- Managing Safety
- School Environmental Awareness
- Slips, trips, and falls in education
- The Fire Safety (England) Regulations 2022
- Waste Electrical and electronic equipment
- Working at Height Awareness
- DSE Users
- Generic infection control
- Guide to completing a risk assessment
- S156 Building Safety Act 2022
- Complete guidance and access to all relevant documents on Educational Visits including any approval as required
- Access to display screen equipment assessment, including appropriate advice, recommendations and action plan
- Fire safety risk assessments, advice and managing works
- Trust wide risk assessments
- Display Energy and Energy Performance Certificates and advice



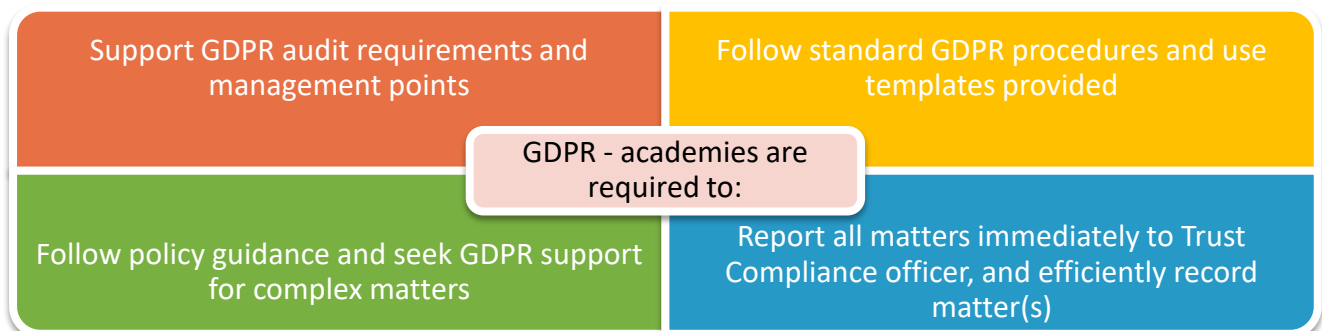
9.1. What is not included?

- Maintaining property asbestos register, managing asbestos removal and providing emergency advice
- Providing advice on water hygiene (legionella prevention) and managing works
- Radon gas advice and management
- Access to training for specialist training:
 - First Aid at work, emergency, and pediatric first aid
 - Educational Visits coordinator
 - Accident reporting and investigation
 - IOSH Managing safely
- Accessibility audits (DDA) and advice
- Property related corporate compliance advice and management
- Electrical testing and inspection

- Any other engineering maintenance work

10. **GDPR/Data Protection**

- GDPR policy and suite of relevant education-based privacy notice(s)
- Annual registration with the ICO
- Data Protection Officer DPO support and audit provision and support with conversations with the ICO (DPO acts as primary contact)
- Training and support on all aspect of data protection compliance; bespoke for data managers and processors
- Data breach, Freedom of Information FOI and subject access request SAR guidance
- Full suite of GDPR policies and procedures (legal checked) and training on effective implementation and monitoring, including but not limited to:
 - Data Protection Regulation Risk Register
 - Consent forms
 - Data inventory
 - Data Protection policy
 - Data Retention schedule
- A biennial GDPR audit from internal auditor with report and action plan, including an internal annual review, monitoring or inspection visit by the Trust DPO
- Risk mitigation and monitoring by Finance, Risk and Audit Committee



11. **Costs procured and organised by the Central Team but paid for by individual schools**

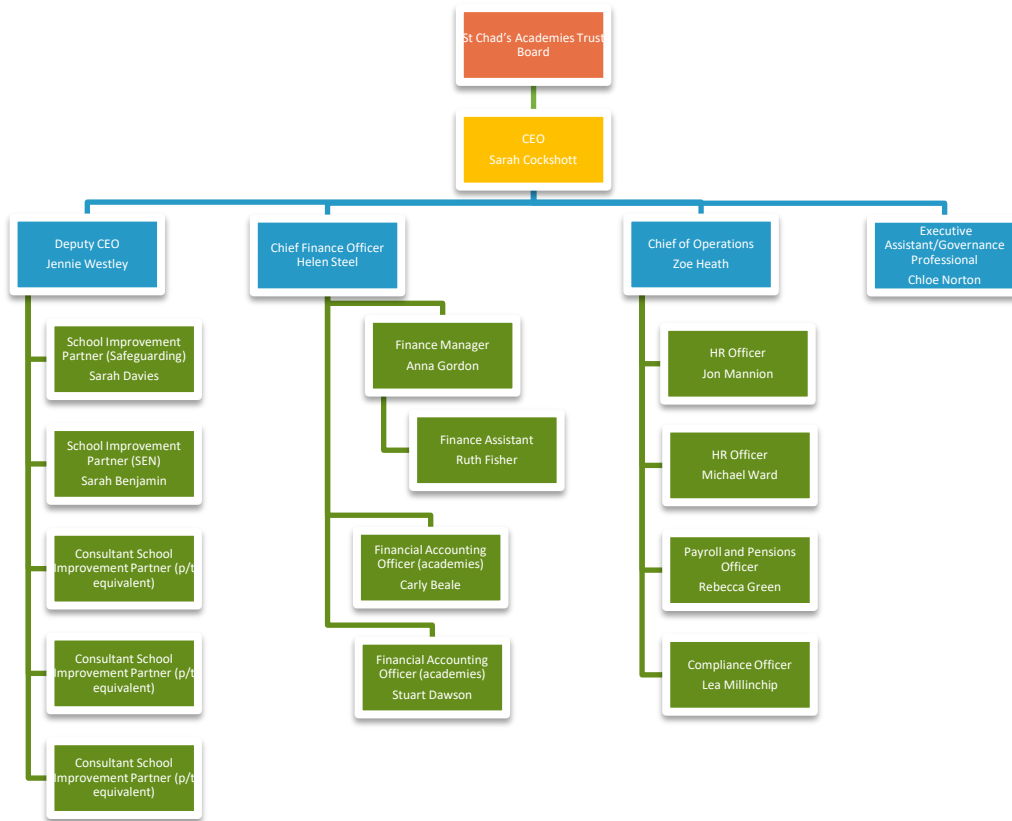
- All charges associated with the LGPS pension scheme administration (including the valuation costs and charges (annual and triennial))
- Insurance brokerage is managed through St Chad's Academies Trust to achieve economies of scale. Each individual academy is responsible for paying for its own additional insurance policies. This service provides access to a qualified health and safety adviser.

The Trust will support with conversations with Walsall Risk and Insurance, as required, when managing incidents/accidents, and can act as a liaison between the academy and insurer.

- All software and license fees associated with operating the financial, budget, compliance, and Safeguarding management systems
- Pension liabilities for individual colleagues.
- Catering contract

- Cleaning contract
- Evolve (EVC) can be procured locally, Trust support available.
- Preferred supplier agreements to support economies of scale.
- Employee Assistance Programme (EAP) – self-referral provision. The Trust current offer consists of:
 - Absence insurance
 - Health and Wellbeing package

12. Organisational structure



13. Service Partners

Supplier	Service
Academy Advisory	Internal auditors
Entrust	Educational visits
Broken Stones	IT management and support
CINTRA	Employee and Payroll services
Concept Education	Property Consultancy
Confederation of Schools Trust CST	Education leadership and governance network
CPOMS	Safeguarding software
Dain's	External audit
DCPro	Management information and assessment system
HOGE	Finance and budgeting software
Lichfield Diocesan Board of Education	SIAMS, church schools and Christian Distinctiveness SLA
Local authorities (Sandwell, Shropshire, Staffordshire, Stoke, Telford & Wrekin, Walsall, Wolverhampton)	Admissions, free school meals, major incidents, place planning, children's service, social services, local Authority Designated Officer (LADO)
IMP	Finance and budgeting software
Optimus Education	Education leadership network & learning platform
Rydal Communications	Telecommunications
Schools Advisory Service SAS	Staff absence insurance and wellbeing support
Safe Smart (Smart Log)	Compliance management system
U Check	Disclosure and Barring Service system
VWV	Legal services



14. **Appendix 1 - Meet the Central Team**

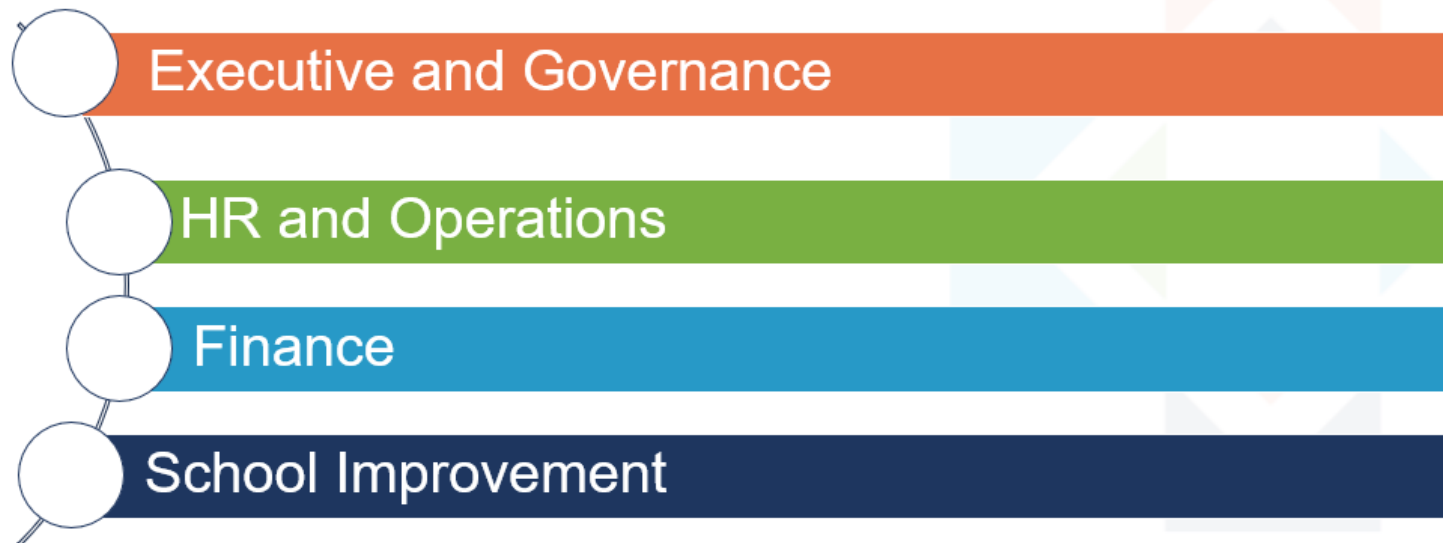
Meet the Central Team

September 2024



St Chad's
Academies Trust

Teams



Chief Executive Officer

Sarah Cockshott



Sarah Cockshott is the Chief Executive Officer of the Trust, where she plays a pivotal role in shaping the Trust's strategic direction while also overseeing governance and school improvement at both strategic and operational levels.

- Providing overall direction and leadership.
- Major corporate decisions.
- Acting as main point of communication between the board and management.
- Acting as a main point of communication between the DfE and the board.
- Creating and ensuring business strategies are completed.
- Setting the trusts vision and strategy including goals for the Trust.
- Serving as the public face of the Trust.
- Ensuring effective performance of all areas of the Trust.
- Representing the organisation to various stakeholders.
- Ensuring effective governance at both local and Trust level.
- Ensuring high standards in school outcomes and performance.

Chief Finance

Helen Steel



Helen Steel is the Chief Finance Officer of the Trust, who plays both a technical and leadership role within the Trust and has the responsibility for the Trust's financial procedures and processes.

- Ensuring compliance with the requirements of the Education and Skills Funding Agency in terms of financial management, control, and governance.
- Overseeing the appropriate use of public money and providing direction and leadership in terms of financial resourcing.
- Creating and ensuring that the Trust's Financial Regulations are met and are compliant with the regulator.
- Creating, maintaining, and carrying out the financial strategy of the Trust.
- Working in liaison with auditors to ensure the effective financial performance of the Trust.
- Ensuring economy, efficiency and effectiveness, and 'Children First' considerations are paramount in financial decision making.
- Leading on risk management practices and procedures.
- Managing the allocation of the Trust's School Condition Allocation.
- Overseeing and managing the Trust central finance team.
- Supporting the Trust's Growth.

Chief of Operations



Zoe Heath



Zoe is the Trust Chief of Operations and manages the responsibility for both strategic and operational practice in the following areas, whilst managing the HR, Compliance and Payroll & Pension Officers:

- Ensuring compliance in transactional recruitment and payroll processing, and system development.
- Overseeing pensions administration, end of year procedures including Teachers Pension audit, and subsequent LGSP health checks and statutory process
- Ensuring HR consultancy and employment relations are relative, current and in line with statutory, legislative, and regulatory guidelines.
- Drives operational improvements in systems, policies, procedures, guidance, and templates to maintain compliance.
- Ensures GDPR and Health and Safety practice is compliant and continues to evolve in line with statutory requirements
- Leads on the development of an effective and efficient estates management, encompassing the development of the Trust's sustainability programme
- Leads on Project management supporting the Trust growth strategy through conversions and significant change applications.
- Operates as primary contact for Trust legal support partner.

Personal Executive Assistant

Chloe Norton



Chloe Norton serves as the Trust's Executive Assistant and Governance Professional. In this multifaceted role, Chloe manages everything from coordinating Quality Learning Network Meetings (QLNMs), to company secretary to overseeing the CEO's schedule to handling aspects of finance support. She also provides a well organised service to our academies at local governance level organising meetings and ensures accurate minute-taking.

- New Local Academy Committee members appointments
- Company Secretary
- New Trustee appointments
- Minute taking
- Organising meetings and ensuring venues are adequate for the meeting purpose
- Financial Administration Support
- Front of House
- Admin support for Executive team
- Agenda setting and dissemination of papers
- Office resource management

Paige Nock



Paige has joined the Central Team in August 2024 to provide maternity cover for Chloe Norton and will be covering all aspects of the role, as outlined above.

HR Officers



Jon Mannion



Michael Ward



Jon and Michael are Trust HR officers, who are designated to academies within the St Chad's family, working within executive models where possible.

They will predominantly work with your senior leaders and business professionals, and can also support academy colleagues with the following:

- Recruitment
- Contracts, change of structures and business cases
- Attendance issues
- Disciplinary matters
- HR policy and procedures; grievance, family leave, flexible working
- Mental and physical health and wellbeing
- Employee relations
- Trade Union support
- General advice and support.

Allocated designated HR provision



Jon

- All Saints National Academy*
- Birchills CE Community Academy*
- Brewood CE Middle Academy*
- Churchfield CE Primary Academy*
- St Mary's CE First Academy*
- St James CE Primary Academy*
- St John's CE Primary Academy, Sandwell*
- St John's CE Primary Academy, Stafford
- St Peter's CE Primary Academy, Bratton
- St Peter's CE Primary Academy, Stonnall*

Michael

- Bishop Lonsdale CE Primary Academy
- Christ Church CE Primary Academy
- Dawley CE Primary Academy
- Havergal CE Primary Academy*
- Holy Trinity CE Primary Academy*
- Mereside CE Primary Academy*
- St Jude's CE Primary Academy*
- St Matthews CE Primary Academy*
- Trinity CE Primary Academy*

* Denotes an executive/federated model



Compliance and Payroll & Pensions

Lea Millinchip



Lea is the Trust Compliance Office and the first point of contact for academy senior leaders and business professionals when considering compliance, where applicable.

- Complaints/whistleblowing
- Subject Access Requests
- GDPR
- Safeguarding/ LADO referrals
- LADO referrals
- Health and Safety compliance
- Smartlog and Staff Safe queries
- Training

Rebecca Green



Rebecca is the Trust Payroll & Pensions Officer, who supports academy senior leaders and business professionals to ensure payroll and pension compliance, supporting with payroll and pension queries.

- Payroll queries
- Payroll processing
- TP & LGPS end of year/audits
- Pensions administration
- Pension queries
- HMRC

Finance Manager



Anna Gordon



Anna is the Finance Manager of the Trust, who plays both a key role in managing the Trust's finance and banking systems and in developing systems and reporting.

- Advising on matters of financial management, control and compliance.
- Leading on system, software and reporting development and management.
- Lead bank liaison and system management.
- Management account reporting, balance sheet reconciliations, prepayments and accruals.
- Year end and month end procedures.
- Supporting schools with forecasting and reporting.
- Liaison with auditors.
- Management of VAT.
- Contracts management.
- Line management of the Assistant Finance Officer.

Finance Officers



Carly Beale



Stuart Dawson



Carly and Stuart are the Financial Accounting Officers for the Trust, who support academy colleagues with financial reporting, forecasting and planning.

- Meeting with academy principals and school business professionals to assess the current financial position and to forecast to year end.
- Advising on matters of financial management, control and compliance in academies.
- Support with management account reporting and cash flow forecasting.
- Creation of management accounts, reconciliations, cash flow and budget forecasts for designated academies.
- Balance sheet reconciliations
- Assess the financial impact of capital works / areas of work requiring business cases.
- Support and challenge financial planning with Principals.
- Support with year end and month end processes.
- Undertake year end and month end processes for designated academies.

Finance Assistant



Ruth Fisher



Ruth Fisher is the Assistant Finance Officer for the Trust, who supports with financial transactional work for the centre and the academies.

- Supporting academies with financial transactional operations.
- Creditor and debtor management and liaison
- Financial transactional work; journal entry; sales and purchase ledger.
- Balance sheet reconciliations
- Bank and charge card reconciliations
- Inter-company transfers for funding / VAT and associated reconciliations
- Support with and undertake with year end and month end processes.
- Supporting academy colleagues with queries

School Improvement



Sarah Davies



Sarah and Sarah are Senior School Improvement Partners dedicated to maximising the performance of our academies.

- Training academy staff.
- Staying updated on educational developments.
- SEND support.
- Curriculum support.
- Analysing Data including internal academy data and outcomes.
- Reporting to Standards and Achievement committee.
- Supporting and organising colleagues to operate network meetings.
- Providing guidance during Ofsted and SIAMS inspections.
- Offering both support and challenge to academy leaders on all aspects of school improvement.
- Organising external academy reviews
- Driving system leadership

Sarah Benjamin





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