

# Value for Money Statement

**Organisation name: PONTEFRACT ACADEMIES TRUST**

**Company number: 8445158**

**Year ended 31 August 2014**

I accept that as accounting officer of PONTEFRACT ACADEMIES TRUST 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.

## IMPROVING EDUCATIONAL OUTCOMES 2013-14

**Key Stage 1** - The investment in training and resources to improve the teaching of phonics across the academy schools has resulted in a rapid improvement in the percentage of pupils who are now working at the expected level from 59% to 71%.

The gap between the achievement of pupils in reading, writing, and maths, in the Trust and nationally has closed, and some significant progress has been made. Where the gaps remain, they mainly affect children of average ability and are more pronounced in maths and reading. The proportions of children achieving at higher levels is broadly in line with the national picture.

**Key Stage 2** - The percentage of pupils achieving the benchmark of at least a Level 4 in reading writing and maths has increased markedly in all of the primary academy schools in the Trust. Attainment is now almost in line with the National Average.

The picture regarding the amount of progress which children make from their starting points is also a very positive picture overall, with significant improvements across all schools and the gap with the national position closing rapidly. Of particular note, is the progress made in writing which has been an area of focus over the last two years with demonstrable impact.

**Key Stage 4** - Against a backdrop of huge changes in performance measures, examination processes and somewhat erratic exam results nationally, the picture of improvement as measured by examination results is mixed at key stage 4, both across and within the secondary academy schools. There are some notable successes regarding improved progress measures in the core subjects and closing the gap between the achievement of disadvantaged and non-disadvantaged pupils. Work is underway to ensure that future cohorts of students and their teachers are well prepared for the new curriculum, examination, assessment and performance measures. The quality of Careers Education and Independent Information and Guidance along with improved curriculum provision (pre-16 in the schools and post-16 locally) and achievement at Key Stage 4, has led to a continuing downward trend in the percentage of pupils recorded as Not in Education Employment or Training (NEET).

**Supporting children with Special Educational Needs and Disabilities** – The Trust has procured 2 dedicated Education Psychologists to ensure that Special Educational Needs and Disabled (SEND) children across the Trust receive consistency in assessment of needs and recommendations for appropriate support. Their participation in the regular Trust wide Special Educational Needs Co-ordinator (SENCO) meetings is essential for ensuring that resources are appropriately targeted and the teachers are supported in delivering the curriculum and adapting teaching to meet the varied and sometimes complex needs of our children with SEND. This more joined up approach is enabling the sharing of good practice with benefits across all schools.

**Supporting Disadvantaged Children** – each school has a clear and costed plan for how they will use their pupil premium funding according to their individual circumstances. The impact of this funding over previous years can be seen in the reports posted on the websites of the individual schools, and where particular interventions have not been deemed to be successful; they have been replaced with carefully researched alternatives. Some schools had

engaged with the national Achievement for All programmes which are aimed at closing the gap, and with significant success. This 2 year programme was purchased for all schools during the summer term 2014 by the Trust with discounts achieved through bulk purchase.

**Attendance** - The academy schools have achieved some significant improvements in attendance rates over the last 2 years. The Trust has supported this improvement by procuring two area based education welfare officers to work across all academies providing a coordinated and consistent approach.

The average attendance in 2014 across the primary academy schools is now broadly in line with the national average. The percentage of children persistently absent from school has also reduced, although is still higher than the national average. The Headteachers and Local Governing Bodies have continued to implement their policy to refuse authorised absence for holidays in term time and issue fixed penalty notices where relevant. In the secondary sector, The King's School attendance has been above the national average for a number of years, and at Carleton Community High School attendance has improved to also be above the national average. Persistent absence in the secondary phase has reduced considerably over time to now be at or below the national average.

**Performance Management** - The Trust has procured a comprehensive performance management system for all its academy schools to use and in doing so achieved a 10% discount through negotiating as one entity. The Trust also negotiated reductions in system training costs as a result of co-ordinated training for all schools at the Trust central offices. The system will provide the tools the Trust schools need to implement manage and track a clear, consistent and robust appraisal policy linked to school improvement priorities. It should ensure each academy school's performance management processes really drive improvement. Individual portfolios ensure all staff takes an active role in their progression and development.

**Assessment of Pupil Progress** - The Trust has also procured a single system to assist the tracking of pupil progress across its primary academy schools and in doing so achieved a saving of approximately 23% on the cost to each academy school if procured independently. The Primary Target Tracker incorporates support for Assessment of Pupil Progress, helping staff avoid time consuming calculations by informing on those pupils making two levels progress in the core subjects. This allows production of tracking grids and graphs that show how children's attainment compares to national standards. At a glance schools can see a pupil's or group's current level, where they were last term, or track their performance over an extended period. The schools can also share anonymised summary data in order to benchmark and identify good practice for sharing. This system will feed into the secondary schools over time, but currently both secondary schools have robust data tracking systems and share summary data through an SLA with the Local Authority.

**Staff Training and Development** - The Trust in its partnership with Pontefract Education Trust continues to lead on facilitating joint inset day events for all academy schools within the Trust and other schools / academies within the wider Education Trust. These events provide training and development for staff in schools by utilising both existing expertise within the Trust and also expertise external to the Trust.

The Trust also commissioned bespoke training by a lead Ofsted Inspector and practicing school improvement partner to help leaders embed a unifying vision of an outstanding academy school and the key tools, plans and strategies to achieve this vision.

**Summer Schools**- The two secondary academy schools within the Trust have provided summer schools particularly aimed at supporting disadvantaged pupils to achieve a smooth transition to Key Stage 3. This has provided an opportunity for helping disadvantaged pupils who were behind in key areas such as literacy and numeracy to catch up with their peers. A spring term six week programme of Maths booster classes taught in and by the secondary academy schools for potential Level 6 Year 6 pupils not only has had a really positive impact by helping to increase the numbers of children achieving level 5 and 6, but has also supported the primary school teachers in this area of their work.

**Sports Provision** – A number of primary academy schools within the Trust have worked in partnership with Pontefract NEW College (an Ofsted rated outstanding FE provider) to improve the quality of the PE and sport activities they offer their pupils. An embryonic partnership with newly formed Pontefract Sports and Education Foundation and initially with secondary pupils is beginning to have impact by building the confidence and self-esteem of those children who may underachieve in reaching their potential in life but who do not fit any specific identified intervention group.

**Children Have Options, Imagination, Challenge and Experience – CHOICE**- a nationally recognised primary intervention programme – the CHOICE project has targeted year 4 to year 6 children in two of the Trust's primary school academies and one other Pontefract school with the aim to re-engage children in education, and improve their attendance and achievement through working to reduce anti-social behaviour in and around the community, building relationships with the police and other agencies such as housing, fire service and drugs education

providers, and providing support for anger management to ensure a crime free lifestyle for participants in the programme. The programme is designed to support/re-engage pupils (and their families) who: find it difficult to access the curriculum and are at risk of under-achieving or exclusion; are at risk of becoming NEET or who display poor life skills. The impact of this programme has led to its expansion into all Trust primary schools in 2014/15 and secondment to the wider district in 2015/16.

The Headteachers of each academy school meet together half termly to monitor, review, and evaluate progress against action plans and recommend new priorities or changes to priorities. These meetings also provide an opportunity for collaboration and shared best practice.

#### FINANCIAL GOVERNANCE AND OVERSIGHT

The Trust commissioned supplementary work programmes from its External Auditors to ensure compliance and accounting practice up to June 2014.

The Trust has commenced its process of reviewing its staffing structures to ensure that it finds the appropriate balance between front line school improvement activity, strong compliance and regulations support, both in-house and contracted. It has been a deliberate policy of the Trust to utilise a mix of existing resources within its academies or contracted services in its early development so that the development of a permanent structure could be achieved without the need for re-structure and its associated costs and liabilities. As part of this process the Trust established and recruited to the position of Director of Finance Business and Operations in June 2014.

A single budget modelling package is utilised across the Trust which facilitates consistent assumptions and consolidated reporting. The Trust Board approved the 2014-15 financial plans for the Trust and each of its schools in July 2014. Alongside this the Trust considered the future plans for 2015-16 and 2016-17 and agreed a process for budget review for the latter end of the Autumn 2014 term into Early Spring 2015.

The Trust also procured a single curriculum modelling package for its secondary academies to better facilitate the link between curriculum and financial planning for future periods.

The board of trustees have undertaken a skills audit which identified the skills required from appointments of new trustees made on 9 April 2014. The board of trustees plan to undertake a self-evaluation of governance during spring 2015, followed by an external review during summer 2015.

The Trustees, Chairs of Local Governing Bodies, Headteachers and School Business Managers meet at least once a term to facilitate communications throughout the Trust on key issues which include those relating to governance and oversight.

#### BETTER PURCHASING

The Director of Finance, Business and Operations and School Business Managers meet as a group on a regular basis which has allowed programmes of improvement to accelerated and areas for efficiencies / cost savings to be identified at an early stage.

In addition, a meeting is also held with the Premises Managers of the Trust to allow further programmes of improvement in practice across the Trust, and an internal mechanism for support and internal cover arrangements during any absences.

The Trust has utilised external procurement support for major contracts for works commissioned as a result of increased funding successfully bid for from the Academies Capital Maintenance Fund.

Four of the primary schools within the Trust have entered into a contract with a new provider following European journal advert for school meal provision. This provision is providing cost savings and better quality meals for these schools.

Four of the primary schools and one of the secondary schools collectively purchased a visitor management system achieving a 10% discount than had they purchased the system separately.

The Trust has completed an analysis of its supplier spending profile over its first 17 months of operation which has provided a foundation for prioritising contract review during the next accounting period.

#### MAXIMISING INCOME GENERATION

The Trust has been successful in bidding for £1.3 million of additional capital funds from the Academies Capital Maintenance Fund. This has facilitated schemes of heating system replacements, window replacements, and kitchen/internal refurbishments.

The Trust also was successful in a bid from the National Lottery for funding totalling £8.8k towards improved library facilities within a primary school.

#### REVIEWING CONTROLS AND MANAGING RISKS

Six academies within the Trust had a review of systems and procedures during September 2013, and the remaining two academies during July/August 2014.

The Audit and Risk Committee have assessed the Trusts compliance with the Academies Financial Handbook 2014 and have a clear action plan in place for strengthening compliance and moving towards best practice.

The Board of Trustees approved and implemented, on the recommendation of the Audit and Risk Committee, the following policies during the period:

- Anti-Fraud Bribery and Corruption Policy
- Whistleblowing Policy
- Financial Regulations & Scheme of Delegation
- Conflicts Policy, including the Register of Business Interests
- Complaints Policy
- Discretions Policy
- Risk Management Policy and Procedures
- Gifts and Hospitality Policy
- Donations Policy
- Accounting Policies

Work is continuing on Trust wide policies and operational procedures promoting good financial management and controls.

#### LESSONS LEARNED (REVIEWING OPERATIONS TO MAXIMISE RESOURCES)

A review of the Human Resource Management arrangements throughout the Trust identified that the use of a number of external providers (albeit limited) had not facilitated human resource management leadership, consistent process or efficiencies across the Trust. This area is currently being reviewed, prior to consideration by Trustees, with a plan to move to either a new position with the Trust or a single external provider.

**Name:** Mrs Julie Craig  
**Academy Trust Accounting Officer**

**Date:** 22 Dec 2014