

**VALUE FOR MONEY STATEMENT  
SEPTEMBER 2014  
ST OSWALDS CATHOLIC ACADEMY TRUST  
COMPANY NUMBER 8924383**

As Accounting Officer of St Oswald's Catholic Academy Trust I accept that I am responsible for ensuring the Trust delivers good value in the use of public resources. I am aware of the 'Guide to Academy Value for Money Statements for Academy Accounting Officers' as published by the Education Funding Agency in August 2014. I understand that Value for Money refers to the educational and wider societal outcomes achieved in return for the tax payers resources received.

The Academy applies and will continue to apply the four principles of best value:

- **Challenge** – is the academy's performance high enough? Why and how is a service provided? Do we still need it? Can it be delivered differently? What do parents want?
- **Compare** – How does the academy's student and financial performance compare with all academies? How does it compare within the Local Authority? How does it compare with academies in similar circumstances?
- **Consult** – How does the academy seek the views of stakeholders about the services provided?
- **Compete** – How does the academy secure efficient and effective services? Are services of appropriate quality?

Governors and senior members of staff/budget holders apply the principles of best value when making decisions about :

- The allocation of resources to best promote the aims and values of the academy
- The targeting of resources to best improve standards and quality of provision
- The use of resources to best support the various educational needs of all students.

Governors and senior members of staff/budget holders :

- Make comparisons with other/similar academies using data provided by the LA and/or the government.
- Challenge proposals, examining them for effectiveness, efficiency and cost.
- Require suppliers to compete on the grounds of cost, and quality of suitability of services/products/back up
- Consult individuals and organisations of quality/suitability of service we provide to parents and students, and services we receive from providers

The pursuit of minor improvements or savings is not cost effective if the administration involves substantial time and or costs. Time wasted on minor improvements or savings can also distract management from more important or valuable areas. This is recognised by the EFA in the Governors Handbook 2014. Therefore governors and senior members of staff do not waste time and resources to make minor savings in cost, by seeking tenders for minor supplies and services or by investigating minor areas where few improvements can be achieved.

The principles identified will apply to:

### Staffing

Governors and managers will deploy staff to provide best value in terms of quality of teaching, quality of learning, adult-pupil ratio and curriculum management. This has been demonstrated by the appointment of :

- An additional teacher of maths in KS3/4 to reduce class sizes and improve outcomes.
- The appointment of a transition teacher to work closely with a high needs set of Year 7 students and to liaise with the primary and secondary members of the trust to ensure smooth transition
- The appointment of a data manager to work across the trust to provide up to date, relevant and accurate data to inform planning and tracking.

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### Use of Premises

Governors and senior staff consider the allocation and use of teaching areas, support areas and communal areas to provide the best environment for teaching and learning, support services and for communal access to central resources.

Two schools in the trust obtained a grant in 2014 to provide books for their libraries. In one school the investment in books ran alongside building and refurbishment work to the library to improve the environment and encourage literacy (all appropriate tender processes evidenced).

Another school has used the books to introduce a reading scheme (Accelerated Reading) to promote and encourage literacy.

In addition investment has been made in:

- New furniture and equipment across schools in August ~~as part of a rolling programme.~~
- New carpets and decoration in secondary school

as part of rolling programme to maintain or improve the learning environment.

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## Use of Resources

Governors and senior staff deploy equipment, materials and services to provide students and staff with resources which support the quality of teaching and learning. The academy has engaged the services of an independent firm of Accountants (Baker Tilley) to act under the direction of the Audit Committee in the role of Responsible Officer. This ensures systems and procedures are sampled and checked termly. Departments have curriculum allocations, with the opportunity to bid for further funding if they feel it is required.

The Trust is a member of Redcar Administrators Forum – working collectively to negotiate better prices with suppliers (ie copy paper).

When investment in ICT equipment/software and resources ~~was made~~ appropriate quotes were obtained and evidenced.

## Teaching and Learning

Governors and senior staff will review the quality of curriculum provision and quality of teaching, to provide parents and students with :

- A curriculum which meets the requirements of the National Curriculum and the needs of students.
- Teaching which builds on previous learning and has high expectations of children's achievements.

### This is evidenced by:

- In September 2014 the appointment of new Heads of Department for English and Maths.
- The appointment of a transition teacher to work across the trust with vulnerable students.
- New English syllabus adopted at KS4.
- Student profiles in place to personalise learning.
- Tracking data via data manager to ensure teachers know students levels and targets and can plan accordingly.
- Sharing expertise and training across the trust – School Improvement Partners, LA Advisors, Director of Education for the Diocese.
- Cross phase transition collaboration.
- Summer school/holiday/after school classes to improve student performance.

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## Purchasing

Governors and senior members of staff/budget holders will :

Continue to follow the procedures in place for assessing need and obtaining goods and services which provide "best value" in terms of suitability, efficiency, time and cost. The Academy Financial Manual clearly set out delegated responsibility for senior staff, Headteachers, Local Management Boards and the Board of Directors.

It states that;

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- competitive tendering procedures are followed where appropriate, and three quotes are obtained when purchasing goods or services over a given limit,
- Procedures for accepting 'best value' quotes which are not necessarily the cheapest (eg suitability for purpose and good workmanship)
- Procedures to minimise office time by the purchase of goods or services under £1,000 from known, reliable suppliers.

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During the period quotations have been obtained and the tender process followed where appropriate. This can be demonstrated in the Library extension, the purchase of ICT equipment and Asbestos surveys.

### Income Generation and Surplus Balances

Governors and senior staff explore every opportunity to generate income through various means such as grant applications and letting of the premises. All surplus cash balances are invested in high interest bearing accounts to maximise interest earning potential.

There is a telephone mast on school grounds and re-negotiations are currently taking place to ensure the best revenue rental going forward

Sports Hall and outdoor all weather pitch are let to local youth and community teams for three hours per night, four nights a week to generate income.

Successful bids have already been made for Foyle Foundation for two schools in the trust. Further grants being explored including Citizenship and Academies Maintenance Fund

### Student Welfare

Governors and senior staff review the quality of the school environment and school ethos in order to provide a supportive environment conducive to learning.

Evidenced in minutes of meetings of governing body and - Evidenced in minutes of meetings at all levels, from departmental, to staff, to leaders, to governors.

This is also evidenced in minutes of academy collaboration meetings.

All students remain on site at lunchtimes.

New catering providers adopted have been appointed across the trust to ensure quality of provision.

### Health and Safety

Governors and senior staff continue to review the quality of the academy environment and equipment, carrying out risk assessments where appropriate, in order to provide a safe working environment for students, staff and visitors. The Trust has

Purchased of a SLA from LA, with a - successful audit in Oct 14.

Completed Asbestos an Extensive extensive Asbestos survey completed, SLA purchased and training provided for key staff.

All Risk Assessments are updated every September or more frequently if required.

New staff receive Health and Safety training.  
Health and Safety is on agenda of whole staff meeting at the beginning of the school year.  
Site Staff receive role-specific training ie. working at heights/ladder training

**Monitoring of Best Value:**

Monitoring of these areas took place :  
Lesson observations, classroom walk-throughs, performance management reviews and work sampling  
Target setting across all departments and regular meetings to review progress and achievement.  
In the annual budget planning process and preparation of the annual accounts.  
The academy/trust development plan(s)  
Analysis of in house performance data, including exam results  
Through the analysis of financial data  
Through the analysis of tracking data.  
Inspection reports where available  
Minutes of meetings of departments/leadership teams, LMB and Board of Director meetings  
Providing Information to parents via the school website

Best value will continue to be monitored and this will be evidenced by reports to the Audit Committee and Board of Directors, sampling and investigations by the independent auditors.

~~T~~he productions of three quotes where necessary when purchasing items over a given limit.

~~B~~bi-annual Health and Safety Inspections.

~~R~~regular review of the curriculum provision across all key stages

~~and Review~~ review of staffing and deployment on a bi- annual basis or more frequent if required.

Signed : ..... **Mrs P Hanrahan**

**Academy Trust Accounting Officer**

Date : .....