



***'Stronger Together'***

## **The Diocese of Leicester Academies Trust (DLAT)**

### **Memorandum of Understanding for Academy Conversion**

# MEMORANDUM OF UNDERSTANDING

## 1. Introduction

- 1.1 This document sets out the commitment of the Diocese of Leicester Academies Trust (DLAT) to provide services to its constituent schools. It explains the rationale for the DLAT's approach within the context of the vision of the Leicester Diocesan Board of Education (DBE) for its wider family of schools.
- 1.2 The Memorandum of Understanding (MoU) outlines the services currently provided centrally within the DLAT and the contribution made as a deduction from schools' budgets in order to fund this work. Within the MoU, the DLAT and its constituent schools acknowledge the level of support provided in the different areas and schools needs to be responsive to current need. The MoU explains how all of the DLAT's schools can be involved in shaping the future development of the services provided and in supporting one another.
- 1.3 This MoU should be read alongside the DLAT's Articles of Association (AoA), Master Funding Agreement (MFA), Supplemental Funding Agreement (SFA) and Scheme of Powers, Duties and Delegation (SPDD). In the event of any conflict between these documents and the MoU, the other documents will prevail. The MoU will be reviewed and updated annually by the DLAT Board of Directors.





## 2 The DLAT's approach

- 2.1 The DLAT is a local family of schools who believe that we are **"Stronger Together"**. Established in 2013 as the Multi-Academy Trust for the Diocese of Leicester, the DLAT welcomes all schools and existing academies who share its values.
- 2.2 The DLAT aims to ensure an outstanding education for all its children, and to promote the Christian ethos and distinctiveness of its schools.
- 2.3 As an academy trust, the DLAT aims to provide high quality business support to maximize the resources available for schools to provide high quality teaching and learning.
- 2.4 The DLAT believes in the importance of the church school at the heart of the local community, with strong links to the parish church. The DLAT works closely with the Leicester Diocesan Board of Education, sharing resources and common values.
- 2.5 All schools within the DLAT family are expected to support one another, by sharing best practice, providing emergency cover, or mentoring and coaching other staff & governors.
- 2.6 The Diocese of Leicester Academies Trust provides:
  - **freedom** for good and outstanding schools to develop and thrive
  - **support** for sponsored academies to improve
  - **stewardship** of our shared resources
  - **nurture** for all of our schools to grow together



### 3. Shared Vision & Values

- 3.1 The DBE has adopted the following as its statement of Vision & Values. This reflects the wider Diocesan strategy, 'Shaped by God'. The DBE set up the DLAT as part of its support for church schools within the Diocese, and the DLAT shares the DBE's values and ethos.

<b><i>Our Vision is to...</i></b> <b><i>'Transform the lives of children and young people'</i></b>	
<b><i>We will do this by enabling our schools to be:</i></b>	
<b>Effective...</b>	As a result of <b>visionary leadership</b> and <b>inspirational teaching</b> , children and young people in the Diocese of Leicester achieve <b>excellence</b> . They are <b>well-rounded</b> and <b>confident</b> with a strong sense of <b>self-worth</b> . As <b>learners transformed</b> , they in turn transform their communities.
<b>Distinctive...</b>	<b>Unequivocally Christ-like</b> , our schools offer children and young people the opportunity to hear the Christian response to <b>life's big questions</b> . Christian <b>Worship is invitational</b> , offering the whole school community an opportunity for <b>renewal</b> and to <b>encounter the person of Jesus Christ</b> . <b>Religious Education is exemplary</b> , enabling a genuine understanding of the role of <b>faith and belief in modern society</b> .
<b>Rooted...</b>	Our schools are rooted in <b>prayer, partnership with parish</b> and wider community and the <b>teachings of Jesus Christ</b> . Children and young people receive <b>excellent Religious Education</b> equipping them with a <b>firm knowledge</b> of the <b>Christian faith</b> and <b>other key faiths</b> .
<b>Inclusive...</b>	Like Jesus himself, our schools are ' <b>scandalously inclusive</b> '. Children and families from <b>all faiths and none</b> are <b>welcomed, respected and cherished</b> . <b>Serving the community</b> in which they are placed, our schools exemplify, ' <b>love your neighbour</b> '.

### 4. DLAT services

- 4.1 The Diocese of Leicester Academies Trust is comprised of both central and local functions. The schools in the DLAT are not separate entities but are an integral part of the DLAT organisation. The core central functions are not services "bought-in" by the schools but are a fundamental part of the way in which education at the local schools is provided. DLAT schools cannot opt out of these core central services. *There are many parts, but one body. The eye cannot say to the hand "I don't need you" and the head cannot say to the feet "I don't need you"* (1 Corinthians 12: 20-21).
- 4.2 Beyond these core services, school leaders may wish to buy in additional services within delegated budgets. These services may be available from the central office team, from other DLAT schools, from the DBE or its consultants, or from organisations outside the DLAT. Subject to normal financial procedures and the need to comply with any DLAT or school-level policies, school leaders are free to procure additional support as they wish.
- 4.3 The Directors of DLAT believe that its school leaders should be enabled and supported to focus on the core functions of their schools, namely educating children. To this end, it believes in

providing as much support as possible to schools in three key areas:

- School Effectiveness & Development
- Finance & Business Support
- Governance, HR & Policy Support



- 4.4 The DLAT's approach is to maintain, and expand if possible, the range of core services provided to its schools in these key areas, since these are services which its school leaders would otherwise need to procure commercially or from rapidly-reducing local authority provision. As a consequence, the DLAT intends to maintain the central contribution at current levels (see below), but to make it work ever harder for schools.
- 4.5 The inclusion of additional areas within the core service provision is driven by the wishes of school leaders in the DLAT and is subject to agreement by the DLAT Directors. In the unlikely event that a function was to be removed from the core service provision, this would be consulted upon within the DLAT and would be subject to agreement by the DLAT Directors.
- 4.6 Mutual support is a fundamental principle of the DLAT. Schools and their leaders will inevitably be at different points in their journey, but are all travelling the same road together. Where a school needs or wants additional support, central staff may be able to provide this directly or may broker the support from elsewhere. Good or Outstanding schools within the DLAT may be ideally placed to provide school improvement support, which would be paid from the Sponsorship Grant of the supported school. By serving as system leaders, the higher-performing schools or those with particular strengths will, in effect, reduce their net financial contribution while benefitting others.
- 4.7 The core services currently provided within the central contribution funding are:

<b>School Effectiveness &amp; Development Support</b>	
<i>Service</i>	<i>Frequency/Description</i>
Annual review	The headteacher and Chair of Governors will be invited to an annual review meeting with Senior officers in order to consider the school's performance in Effectiveness, Governance and Business & Finance.
School Improvement Support	The equivalent of 12 days bespoke support from a DLAT School Effectiveness Officer, focusing each term on attainment & progress, teaching & learning and leadership & management respectively.
In-depth Review of Educational Provision	At least annually, DLAT commissions a qualified Ofsted inspector to undertake a review of educational provision and its impact.
External advisor at Headteacher Performance Management	Annual
OFSTED & SIAMS inspection support	As required, supporting school and attending inspection feedback.

Data analysis & monitoring	DLAT-wide monitoring of school data to ensure issues addressed locally and to identify cross-cutting trends. Detailed review of data in autumn term improvement visit.
Ongoing advice & support	Routine visits by a DLAT School Effectiveness Officer, at least termly, and telephone/email advice as required
Staff training & development	Staff and governor training generally is a matter for schools to arrange within delegated budgets, but the DLAT provides some training courses either subsidised or at no extra cost to DLAT members. Details of currently available courses can be obtained on request.
DLAT Senior Leadership Team, Chairs of Local Governors Group, working and research groups	Developing training for staff and governors across school functions. Sharing best practice within DLAT & other Diocesan schools.
RE & Collective Worship training	Annual training course for RE coordinators and foundation governors, in partnership with DBE.
Subscription to DBE Partnership Agreement	Annual subscription paid, with entitlement to access services without charge/at reduced cost, in accordance with that agreement.
Liaison with DfE, ESFA & Local Authorities	DLAT Officers provide a central point of contact for all enquiries from DfE & ESFA about individual schools or DLAT-wide issues. Liaison with LA in relation to central services.

Finance & Business Support	
Service	Frequency/Description
Financial Advice, Support and Training for: <ul style="list-style-type: none"> <li>• Budget Forecasting</li> <li>• Financial Reporting</li> <li>• Financial Systems</li> <li>• Procurement</li> <li>• Insurance</li> <li>• VAT Returns</li> <li>• Business Planning</li> <li>• Income Generation</li> <li>• Internal and External Audit</li> <li>• Statutory Returns</li> <li>• Capital Projects</li> </ul>	<p>The main role of the Central DLAT Business Team is to work with the DLAT schools on an ongoing basis to ensure that the required resources are available for effective teaching and learning.</p> <p>The Business Team consists of a Financial Controller (Management Accountant), DLAT School Bursar and Finance Assistant.</p> <p>Collectively the Business Team has a vast range of expertise available to provide proactive and reactive support to meet each DLAT school's needs.</p>

Accountancy & Statutory Financial Returns	All schools are part of the DLAT and therefore all Statutory Financial Returns to the ESFA, HMRC and Companies House are completed when required by the Business Team with input from each of the schools.
Internal & External Audit	<p>Internal Audit - All schools will go through a cycle of Health Check and Full-Audits on an annual basis.</p> <p>External Audit – This is carried out annually to ensure DLAT and its schools are meeting financial and regulatory requirements.</p> <p>The Business Team will coordinate and support schools through both the Internal and External Audits to ensure continued high standards.</p>
Pensions Actuary	This is carried out annually to assess the Pension Deficit position for accounting purposes.
DLAT Bursar service	The Bursar Service will provide ongoing support to ensure systems are being used correctly across all DLAT schools. This will consist of approximately two visits per term. DLAT schools may purchase more regular visits to help support the day-to-day financial work.
Health & Safety Audit and Support	Health and Safety Audits are a statutory requirement and take place on a three-year cycle to ensure all Health and Safety requirements are being met. Schools will receive an action plan after each audit to address any issues raised, with work to be funded by the school or through external capital grants.
Insurance	<p>Apart from Staff Absence Insurance, the Business Team procure and coordinate all of the necessary insurance required for each school. The range of cover includes Employers, Governor and Public Liability; Property; School Trips; Professional Indemnity; Hirers; Fidelity Guarantee; Business Interruption; Money Cover; Computer All Risks and Works In Progress. Further details of the cover are available on request.</p> <p>Ill Health Pension Insurance is coordinated by the Business Team and recharged to each school. This is calculated at 0.9% of the total payroll for support staff. There is a subsequent saving of 0.9% on employer to pension contributions for support staff.</p>

Capita SIMS/FMS & Multiview Systems	The Business Team and every school within DLAT use Capita's Financial Management and Multiview systems. This allows us to have a consistent approach to financial management. The costs of this system are met fully from the DLAT central contribution.
Education and Skills Funding Agency - Academies Capital Maintenance Fund Bids	These are coordinated centrally by the Business Team in conjunction with YMD Boon Ltd as and when schools are eligible to bid.
Central Procurement for Selected Services	The DLAT will advise on the procurement of any goods or services schools may require and will, if appropriate, coordinate centrally on behalf of all schools. DLAT Directors decide on an annual basis strategic procurement to enable best value for the DLAT.

<b>Governance, Human Resources &amp; Policy Support</b>	
<i>Service</i>	<i>Frequency/Description</i>
Support from Governance Consultant	Advice and support for governance from an experienced consultant This will inform additional training required.
Centralised policies & documentation	Developing central policies and procedures for use across DLAT. Reviewing & revising existing policies as required by new legislation/guidance or at request of schools.
Admissions service	Provision of Common Admissions Policy, and advice as required in relation to admissions and appeals. DBE appeals panel deals with all DLAT admission appeals, through Partnership Agreement.
Networks: Headteachers, Business Staff, Working Groups	Termly meetings for DLAT Networks, for dissemination of information, sharing views/issues & training
Strategic HR support & advice	All HR policies and procedures are developed centrally in conjunction with DLAT schools. This includes consultation with recognised unions through the Joint Consultative Group. Operational HR is currently provided by Leicestershire County Council. The cost of this is met by the DLAT schools.
Governance training, advice & support	Central point of advice for DLAT governors. Administering appointment process for DLAT Director appointed Foundation Governors in conjunction with the DBE.
DLAT Web Portal	Provision of DLAT website, hosting all DLAT policies and news. Secure access areas for school leaders.



Subscription to DBE Partnership Agreement	Annual subscription paid, with entitlement to access services without charge/at reduced cost, in accordance with that agreement.
Liaison with DfE, ESFA & Local Authorities	DLAT Officers provide a central point of contact for all enquiries from DfE & ESFA about individual schools or DLAT-wide issues. Liaison with LA in relation to central services.



- 4.8 Additional services are also available from the DLAT and from the DBE and its consultants, at an additional cost according to the service provided. These include:

<b>Additional Services available (not included in the central contribution)</b>
<i>Service (for further details, see Diocesan Partnership Agreement)</i>
Buildings maintenance
HR Project work/Bespoke HR training
Attendance Officer support
Additional school improvement project work & training
External Review of Governance/ Governor Training
Clerking of meetings, panels & hearings

## 5. Financial Contribution

5.1 The DLAT receives all funding from the Education and Skills Funding Agency (ESFA) in respect of each school within the DLAT. This funding includes:

- General Annual Grant (GAG), which includes the School Budget Share and the Educational Services Grant.
- Pupil Premium
- Primary Sports Grant
- Devolved Formula Capital (DFC)



Sponsored academies also attract a one-off School Improvement Grant, paid to the DLAT. The expenditure of this grant is agreed between DLAT Officers and the sponsored school.

The local authority also provides top-up funding for pupils with Education & Health Care Plans and for early years provision.

All funding is transferred to each school bank account by DLAT shortly after it is received from the ESFA. Schools receive a monthly statement to show the type and amount of funding transferred.

5.2 The DLAT retains 5% of the School Budget Share at source as a central contribution to pay for core central services. No deduction is made from any other income stream.

5.3 In the unlikely event that the DLAT needed to change the basis of the central contribution, this would be a decision for the DLAT Directors after full consultation with Local Governing Bodies and Headteachers within the DLAT.

## 6. Shaping the future

6.1 There are many opportunities for school leaders within the DLAT to be involved in the future direction of the DLAT, through the structure of the organisation, through consultation and through feedback.

6.2 Structurally, the DLAT Board of Directors includes a balance of suitably skilled professionals from an education and business background, alongside the Chief Executive Officer who is also the Accounting Officer, representatives of the DBE and other directors recruited on the basis of skills, capacity and ethos. Other school representatives are involved in the work of DLAT providing opportunities to comment on proposals and to influence decisions about the services provided.

6.3 DLAT Officers meet regularly with Headteachers and with Chairs of Governors. The DLAT positively welcomes feedback about its services and suggestions for improvements.

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