

# **Value for Money Statement**

**Academy trust name: Wakefield City Academies Trust**

**Academy trust company number: 07462885**

**Year ended 31 August 2014**

I accept that as accounting officer of **Wakefield City Academies Trust (WCAT)** 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 WCAT's use of its resources has provided good value for money during the academic year.

## **Improving student performance in primary and secondary academies**

### **1. Targeted improvements**

#### **Staffing structures**

Each academy's staffing structure has been the subject of review with respect to:

- the effective deployment of staff by skill set and experience
- cost effective staffing ensuring prudent use of our budget resources

New Headteachers have been placed in Montagu and West End primary academies and new Principals installed in Balby Carr, Goole and Yewlands secondary academies. Each has made an immediate impact which has been documented by local authority, HMI and Ofsted inspector visits and reports and further reflected in improved student achievement outcomes. Where Headteacher/Principal leadership has fallen far short of our exacting standards Wakefield City Academies Trust (WCAT) has sought to replace them. The Headteacher of Balby Carr decided to take early retirement effective from 1<sup>st</sup> September 2014 and the two 'Joint Executive Co-Headteachers' of Goole academy have agreed a professional exit strategy effective from 31<sup>st</sup> May 2015. This has not involved a lump sum settlement.

The SLT structures in all WCAT academies have, or are in the process of being streamlined with unequivocally clear lines of accountability. The entire structure of Goole Academy for example has been remodelled from a confused and muddled 'three schools in one school' arrangement to a single academy 11-18 provision. The number of Head teacher posts at Goole has been reduced from 5 (HT of prep school Y7- 9; HT Vocational

School (an internal unit for disaffected students) Y7-11; HT Academy Y9-13 along with two Joint Executive Co-Headteachers). Now a single Principal with a strong SLT is in place. The new structure not only represents far better value for money, but has brought clarity and a greater sense of purpose to a previously demoralised staff.

### **Teaching Support**

Funding provides additional support in departments to raise standards through the deployment of Higher Level Teaching Assistants (HLTA). Each academy now has HLTA level support in the core subjects of English and maths

Behaviour for Learning (BFL) support is being developed and coordinated by a senior director of WCAT in each secondary academy to help improve student outcomes. Initiatives have included remodelling casual support (e.g. 'The Net'), by placing it instead on a systematic footing with an inclusion room and withdrawal unit within a fully staffed base. Students continue their studies here under close supervision and progress, behaviour and attitude to learning is closely monitored.

'One to One' funding is allocated to maths and English for supporting individuals to ensure targeted improvements in achievement in these two important subject areas.

Intervention teams meet fortnightly across WCATs secondary academies and are attended by directors of learning. Similarly, primary Headteachers and curriculum coordinators meet regularly to discuss progress and to share good practice. When appropriate, additional funding is used to target improvement across any areas of curriculum need.

Wakefield City Academy partially funds a science adviser to add capacity to the science departments and to target underperformance with certain groups of students.

The WCAT central team work across all academies and visit them on a daily basis to support and enhance the achievements of targeted groups of students in maths, English, ICT, and French in addition to developing literacy and numeracy for all students.

### **Curriculum Development**

Curriculum development with attendant sharper assessment arrangements have continued apace throughout the past year, not only in response to government initiated reforms, but also through the ongoing determination of WCAT leaders, to deliver a fit for purpose 21<sup>st</sup> century education for all students. Valuable courses for students, but not recognised by government for examination league table purposes, have been retained as WCAT stays true to its belief in a 'whole and rounded education' experience of excellence, which equips all students for a successful life in modern Britain.

## **Target Setting and Tracking of Student Achievement**

WCAT's robust tracking system for ongoing, systematic monitoring of achievement has been further enhanced with the development for secondary academies of EPIC analysis. EPIC is an 'in-house' cutting edge tool which, based on national transition matrices, breaks down percentage chances of obtaining A\*- C passes in all subjects by using fine grades. Level 4 test results are broken down into 4a, 4b and 4c. The chances of obtaining A\*-C passes, we have discovered, varies from 27% at 4c to 57% at 4b and 77% at 4a. This makes target setting and tracking performance more precise. It is now being deployed across the secondary academies and will impact significantly in 2015. It is planned to develop this level of analysis for our primary academies. Developing home produced cutting edge assessment tools to complement 4Matrix and Educational Outcomes systems represents a substantial saving from the purchase of expensive 'off the shelf' commercial products.

By working with and advising the producers of 4Matrix and Educational Outcomes we are able to not only acquire discounts but make these systems more bespoke to our context. This will also assist us further to raise standards.

WCAT continually seeks ways to understand how data can inform staff in order for them to support and extend the learning of students.

Some other key foci are set out below:

### **Professional Development**

Extensive joint CPD in teaching and learning is a key feature of our work and groups of teachers are brought together across WCAT to share best practice and to learn from national experts such as Hywel Roberts. The full suite of national leadership courses (NPQH, NPQSL and NPQML) is delivered in conjunction with Wakefield City Academy's National Teaching School. Two members of WCAT (the CEO and a senior director) are National College accredited to deliver the courses. As such the courses are delivered at a discounted rate of 50%.

WCAT currently has 3 National Leaders of Education (2 secondary and 1 primary with another who is in the current accreditation round) and a National Leader of Governance with another pending. Significant resources indeed on which to lead professional development when one considers some shire counties can only muster 2 NLEs amongst their ranks.

### **2. Collaboration**

WCAT includes academies such as Wakefield City which has a long history of collaborating with and supporting other schools nationally (300+ as a consultant school for SSAT and Tribal as well as bespoke provision for a number of northern local authorities). The linkages developed have led, in a number of cases, to schools seeking to convert to academy status as part of WCAT.

All academies are required to participate in joint:

- sharing of best practice at an annual spring conference
- supporting other academies in WCAT, and those beyond request it where capacity permits
- leadership training
- continuing professional development (CPD) sessions
- department subject meetings
- policy planning, preparation and implementation
- appraisal and performance management discussions.

Education Welfare and Human Resource services are supplied centrally and have:

- smoothed the way for difficult negotiations with ineffective staff
- helped raise attendance and reduce persistent absence across the WCAT.

WCAT has been identified by the DfE as a strong sponsor and is supporting other trusts in setting up and establishing MATs including the Majesdki Academy in Reading and the East Midlands MAT.

Through the Wakefield City Academy Regional Teaching School Alliance, WCAT is engaged in a strong collaboration with over 75 regional schools/academies as strategic partners to deliver: CPD; Initial Teacher Training (ITT); Specialist Leaders in Education (SLEs), 'Securing Good' and other collaborative developmental projects. This support is extended out to other partners both within and outside the local authority area.

The Core Team have developed a comprehensive and consistent collaborative approach to supporting the academies within the Trust. This approach has been effective and we have seen rapid improvements in educational performance, particularly in the primary academies.

Where appropriate, we have also made use of external expertise to act as a catalyst to improve the quality of teaching and learning, examples of this include the use of Ofsted inspectors to provide external assessments of the quality of lessons.

### **3. New initiatives**

Academies have been taken on at various times during the year which has meant that budget planning has been revised and updated on a regular basis to reflect the impact of the changes.

WCAT has continued to undertake robust financial management and has extended the finance team to ensure it controls expenditure within available resource and effectively targets funding to areas of most need. Each academy has considered financial performance on a monthly basis making any necessary adjustments as required.

New financial risk software has been introduced and business and finance officers meet regularly for training and updates on the new system.

Staffing budgets have been reviewed and the Trust has been able to manage overall staffing costs by moving staff between academies within the Trust.

An additional member of staff has been appointed through 'catch up' funding to support the focus on literacy. This is vital if we are to meet the government's agenda for examination and curriculum reforms.

Wakefield City Academy's third consecutive Outstanding Ofsted grading in March 2013 has meant that prior to the nationally anticipated expansion in secondary numbers on roll, whereas numbers have fallen locally, WCA has fared better than most schools in Wakefield. Primary numbers in the Wakefield LA primary academies have risen significantly since conversion particularly at Havercroft Academy. Goole too has seen increased numbers enrolling in 2014 following joining the Trust.

A projected increase in student numbers over the next few years means that additional staffing and teaching rooms will be required. WCAT is working with the LAs across South and West Yorkshire and the East Riding to plan a strategy and financial allocations to deal with this scenario.

New fire alarms have been fitted at Balby Carr and Wakefield City which has also had more cost effective gas boilers installed. Bids to the ACMF have resulted in an investment in refurbishment of the Trust's buildings of over £3million. This not only improves the learning environment but also prevents the closure of sections of the buildings during adverse weather. As a by-product of the works, the thermal performance of the buildings will be improved, reducing heating costs.

#### **4. Examination performance**

It is difficult to quantify examination performance at secondary level because of the huge shift in grade boundaries and changes to which subjects count for league table purposes. The best way is to compare performance against national averages (See Table 2 below).

WCAT makes extensive use of data to quantify improvements and track student progress, in order to build appropriate, tailored and personalised intervention plans.

There is a constant review of the curriculum and staffing model to ensure that it meets the needs of all students. English and maths continue to be a priority across the WCAT with extra staffing resources being allocated to help secure the required improvement in results.

The tables below provide a brief summary of the impressive academic performance of WCAT academies during the past year:

**Table 1 - Primary Academies**

Academy	Level 4+ Reading, Writing & Maths			Expected Progress - Reading			Expected Progress - Writing			Expected Progress - Maths		
	2014 %	2013 %	V	2014 %	2013 %	V	2014 %	2013 %	V	2014 %	2013 %	V
Havercroft Academy	<b>59</b>	52	<b>+7</b>	<b>89</b>	79	<b>+10</b>	<b>94</b>	70	<b>+16</b>	<b>78</b>	74	<b>+4</b>
West End Academy	<b>64</b>	56	<b>+12</b>	<b>96</b>	84	<b>+12</b>	<b>100</b>	91	<b>+9</b>	<b>96</b>	69	<b>+27</b>
Montagu Academy	52	62	-10	<b>88</b>	68	<b>+20</b>	64	85	-21	54	62	-8
Heath View Academy	<b>63</b>	51	<b>+12</b>	<b>90</b>	72	<b>+18</b>	<b>95</b>	91	<b>+6</b>	<b>85</b>	75	<b>+10</b>
Willow Academy	<b>92</b>	73	<b>+19</b>	<b>95</b>	95	0	<b>92</b>	91	<b>+1</b>	<b>93</b>	91	<b>+2</b>

**NB:** Small numbers of students can have a disproportionate effect on results  
A cohort of 10 in small schools means each student is worth 10%  
V= Variance 2013 to 2014

**Table 2 - Secondary Academies [DfE First statistical release data]**

Academy	APS	5+ A*- Cs including English & Maths					
		2014	Nat	Acad v Nat	2013	Nat	Acad v Nat
Wakefield City Academy	25.4	<b>58</b>	52.6	+5.4	66	60	+6.0
Hemsworth Arts & Community Acad	27.1	47	52.6	-5.6	48	60	-12.0
Balby Carr Community Academy	27.0	43	52.6	-10.4	45	60	-15.0
Yewlands Academy	27.0	52	52.6	-0.6	36	60	-24.0
Goole Academy	25.9	41	52.6	-11.6	43	60	-17.0

Bold figures represent the raw attainment improvement. In particular, the performance of our primary academies in such a short space of time is remarkable.

However, raw results mask the nature of the cohort, for example Wakefield City Academy has produced its most impressive raw attainment results by remaining above national average on the 5A\*-C with English and Maths Key Performance Indicator with a cohort of students with measured prior attainment in the lowest 4% nationally and 20% lower than the previous year. i.e. A slight drop of 0.6% above national with a cohort of students with prior attainment weaker by a factor of 5

Secondary academies such as Yewlands have made remarkable progress – the biggest rise in performance across Sheffield LA.

As systems and structures bed down then we expect more significant rises in future years.

Already one primary academy, Willow, has moved out of an Ofsted category. Two others have been assessed by local authority advisers to have moved from grade 4 to grade 2 whilst HMI has praised the work and improvements at Goole and Yewlands secondary academies.

## **Financial Governance & Oversight**

As Accounting Officer I have responsibility for reviewing the effectiveness of the system of internal control. During the year in question the review has been informed by:

- the work of the external auditor
- internal audit reviews
- the continued development of governance arrangements within the multi-academy trust
- the work of the senior leaders within the academy trust who have responsibility for the development and maintenance of the internal control framework

During the year WCAT has implemented both an Audit and Risk Committee and Finance and General Purposes Committee. These committees have a regular cycle of meetings and report into the WCAT Board.

WCAT's system of internal financial control is based on a framework of regular management information and administrative procedures including the segregation of duties and a system of delegation and accountability. In particular it includes:

- comprehensive budgeting and monitoring systems with an annual budget and periodic financial reports which are reviewed and agreed by the board of trustees;
- a five year budget projection to ensure that the long term impact of financial decisions can be assessed and action taken where necessary to ensure that WCAT remains a 'going concern' and each of the academies remain viable
- periodic reviews by the finance and general purposes committee of reports which indicate financial performance against the forecasts and of major purchase plans, capital works and expenditure programmes;
- setting targets to measure financial and other performance;
- clearly defined purchasing (asset purchase or capital investment) guidelines;
- delegation of authority and segregation of duties;
- identification and management of risks.

## **Better Purchasing**

Tendering exercises are carried out regularly and on every contract renewal to ensure that the best possible prices and service levels are achieved. Savings on renewal are often achieved, in one case this year securing a reduction in cost over the life of a waste management contract of almost 40%.

A register of all contracts and services has been developed and all contracts are appraised in a timely manner to ensure that best value is delivered through a mix of price, quality and effectiveness. As WCAT develops its own in-house expertise a number of external contracts have been terminated.

WCAT is developing benchmarking arrangements for all the academies under its umbrella and also with similar organisations. This is being achieved through the utilisation of comparative data and participation in Finance Director (FD) forum discussions.

Our budget holders are continuously looking for the most competitive deals using various procurement tools.

The Board, Local Governing Bodies (LGBs) and Senior Leadership Teams (SLTs) apply the principles of best value when making decisions about the use of resources. This includes using options appraisal for major procurement requirements which are based on best practice models.

WCAT has also developed procedures for assessing need, and obtaining goods and services which provide best value in terms of suitability, efficiency, time and cost. Measures in place include:

- competitive tendering procedures
- procedures for accepting best value quotes, which are not necessarily the cheapest (e.g. suitability for purpose and quality of workmanship)

WCAT is always looking for opportunities to work collaboratively with others to reduce and share operational and administrative costs. In addition regular reviews of our own services are undertaken to ensure we are achieving best value.

Working in partnership with The Freeston Academy we have improved on both the cost and the quality of provision in two key areas, these being our joint HR officer and our joint EWO. We have also joined with four other academies in purchasing the services of an Education Psychologist (EPS) from Wakefield Council giving a vastly improved service and an hourly rate reduced by almost 50%.

### **Better Income Generation**

Opportunities have been taken to explore and generate additional and reliable income streams. This includes, letting of sports facilities and partnership working.

The Academy has been successful with a number of external income streams including Summer School funding, ACMF and sponsorship of specific events.

### **Reviewing Controls and Managing Risks**

WCAT operates an Audit and Risk Committee which provides support to the Board in fulfilling its oversight responsibilities for internal controls and for maintaining an appropriate relationship with the Trust's external auditor, Allotts Chartered Accountants.



WCAT has a Risk Management Strategy in place which sets out the processes and responsibilities for risk management in the Trust.

The Trustees are aware of their responsibilities to secure the funds and assets of the trust and have a full awareness of the risk of fraud and irregularity occurring in the organisation. WCAT has an Anti-Fraud Policy and Fraud Response Plan to ensure that appropriate controls are in place and to ensure that appropriate action is taken where fraud and irregularity is suspected or identified.

Trustees, Governors and Budget holders receive regular budget reports which are scrutinised to ensure the most effective use of resources to meet the objectives of the trust.

WCAT has an Investment Strategy to ensure that any investment activity is undertaken within a controlled framework. All investments are reported to Trustees on a regular basis.

Insurance levels are reviewed annually in conjunction with our insurance advisors to ensure that all relevant risks are covered. For some of the newer converted academies we have entered into the Risk Protection Arrangement provided by the DfE.

The Trustees review the reserves level of the Trust annually. This review encompasses the nature of income and expenditure streams, the need to match income with commitments and the nature of reserves. The Trustees have determined that an appropriate level of reserves will be maintained to provide sufficient working capital to cover potential delays in the receipt of income, to provide sufficient resources to deal with unexpected emergencies and to plan for future capital projects.

### **Lessons Learned**

The Trust is in its fourth year of operation and has expanded from 2 to 11 academies during 2013/14. The rapid expansion has had no detrimental effect on the quantity or quality of support delivered to academies across the chain.

Project management has now been brought in-house using home grown skills and expertise developed over the past two years.

We are continuing to develop an understanding of the options available to us and the autonomy and flexibilities we have.

Our continued goal to develop outstanding academies and support high student achievement remains our top priority.

WCAT has used specialist services to aid grant applications and this has resulted in additional funding being received.

We have learned from external feedback that we have laid sound foundations and systems which backed up by talented and skilled personnel can make WCAT an outstanding provider.

Signed: ..... *Alan G. Yellup* .....  
Name: ..... **ALAN GEORGE YELLUP** .....  
Academy Trust Accounting Officer  
Date: ..... *27th January 2015* .....