



## **Proposal for St Wilfrid's Church of England Primary School to join the Hurst Education Trust**

### **Questions raised during consultation**

- **What are the appointment procedures for HET Membership (including Trustees) and do local academy schools, through participation of governors or teaching professionals, have representation on any of the higher-level Trust managing bodies?**

**How are Trustees/ Members qualified to oversee the local educational management of academy schools, within their orbit, other than through their normal roles as, for example, senior Diocesan appointees or through business experience? In simple terms, who are these people and what educational skills/experience do they bring to HET?**

**Will Diocesan or Trusteeship representation on HET influence the local religious traditions of associated Parish churches?**

**How far will membership of HET and the roles of Members/Trustees and the CEO, affect the autonomy of the Local Governing Body to appoint, for example, Chairpersons and the formulation and delivery of school budgets?**

The board of trustees are selected primarily based on their skills, experience, and what they can ultimately bring to the board. The intention is to create a mix of those with relevant education, business/finance, and Church background. To that end, of the nine trustees currently selected, five are former headteachers in the maintained sector, two are chartered accountants and two are serving clergy. We have retained two 'spaces' on the board for new trustees from the communities the HET will serve when that is confirmed. In terms of background and safeguards, the trustees (both as individuals and collectively) have been extensively considered by the Diocesan Board of Education and the Department for Education (as well as our own internal scrutiny of their capability and capacity to serve the HET). There are safeguards in place to ensure a balance of those connected to the College, the Diocese and from elsewhere.

The Trust has committed to each school retaining a Local Governing Body

(LGB). It is not proposed that representatives of LGBs become Trustees of the HET as this will be unsustainable as the Trust grows, and mixing levels of governance can often lead to significant challenges for the individuals.

A list of Members and Trustees can be found on the HET website (hurst.education) or listed at Companies House. Specific details of the appointment procedures may be found in the Articles of Association.

- **Please can you explain why St Wilfrid's is considering a voluntary conversion to an academy at this point? As far as I can see there are no government white papers or changes in legislation being proposed to force all schools to convert to multi-academy trusts. Whilst this may be an aspiration of the Education Secretary there is nothing as far as I can see requiring that this is done now.**

The School has identified that in order to achieve further improvement to become an "Outstanding" school, it needs additional support that the Local Authority is unable to provide.

- **What other multi-academy trusts were considered?**

As a voluntary aided school, St Wilfrid's must join a church majority MAT. In our diocese, there are only three church majority MATs - HET, DCAT and BOAT. Governors have identified that of the three options, the HET is the most closely aligned with our school with a unique offer that will allow us to improve to "Outstanding".

- **In Haywards Heath Sussex Learning Trust are an established multi-academy trust incorporating not just primary schools but also a secondary school. Approximately half of our children transfer to this secondary school at the end of primary school. Please can you explain why the Sussex Learning Trust was discounted?**

The Sussex Learning Trust is not a church-based Trust, and therefore St Wilfrid's would not be able to join this Trust unless it were to become a Church majority Trust.

- **Hurst Education Trust is a new multi-academy trust (MAT) with the first school set to join in March 2022. There is no publicly available financial information (policies or otherwise) which I can find online. a) How are governors assured that Hurst Education Trust's 3% charge for services previously provided by West Sussex County Council is correct given that the Trust is yet not up and running? Given that the sector average is 5-7% how do we know that this won't be increased upon joining?**

The Governors have worked with the Trust to establish the longevity of the proposed arrangement. As many of the services provided by the Trust will be provided to the Trust by the College, the substantial savings to the Trust can be passed to the School and this ensures the ongoing viability of the management charge.

**b) Please can you advise what Hurst Education's Reserves Policy is and how St Wilfrid's contribution will be achieved over the short term without significantly negatively impacting school finances?**

Reserves will be ringfenced for each individual school. Schools will be expected to operate a balanced budget, with an aim to building a small yearly surplus to provide short-term protection against unmitigated and unforeseen costs.

**c) Please can you explain how capital expenditure will be funded as part of the MAT going forward?**

The school will currently receive both formulaic DFCG funding from the ESFA, and SCA (formerly LCVAP funding) from the Diocese, based on successful bids. Governors are required to raise 10% funding for any SCA project.

As an academy in a small trust, the school/Trust can bid for CIF funding from the ESFA on an annual basis, and the DFCG funding will continue to be funded by the ESFA. Governors will no longer be required to raise 10% towards funded capital projects.

**d) Are there any pension deficits on the staff pension funds (both teaching and administration staff). How will these be addressed on transfer to the MAT?**

Both TP and LGPS schemes are defined-benefit, and in the case of the TPS there is no investment or fund managers (and therefore no quantifiable position from an accounting perspective).

The LGPS, which will remain with West Sussex, and administered by Hampshire County Council, will undergo an actuarial valuation at the point of transfer. Any financial position (and future gains/losses) will be recorded in the Trust accounts. It is important to note that any gains or losses are non-crystallising, and therefore do not have any direct impact on the Trust which is similar to the current position with how the financial position is recorded currently within the Local Authority's own accounts.

**e) Were a school in a deficit position to join Hurst Education MAT then it is very likely that other schools would be required to financially support that school, diverting funds away from St Wilfrid's. Are you able to advise how this risk is mitigated and provide associated policies regarding this? Will St Wilfrid's have any veto rights to prevent a school joining the MAT until its financial position has improved?**

The HET will not operate pooled financial resources, and therefore no funds from St Wilfrid's would be used to support another school within the Trust if they were to be in a deficit budget.

The decision on whether to admit other schools is the trustees decision(subject to relevant consents from the Department for Education, the

Diocese and the incoming school governors). The outcome of financial due diligence will play a key role in deciding whether to admit the school into the Trust.

**f) What are the Hurst Education Trust staff remuneration policies and how will they differ?**

The Trust will initially follow existing non contractual policies to maintain the 'status quo'. The Trust will be required to adopt its own pay policy, but has already agreed to follow national terms and conditions and recognise collective bargaining. We do not expect any practical change to the existing process, except as a smaller organisation the decision to approve a pay policy annually is likely to be quicker than at present.

**g) What remuneration will the Trustees of Hurst Education Trust receive?**

The role of trustee is a voluntary position (much like a governor). No trustees will, therefore, receive any remuneration for their role - this is, in any case, prohibited by the Trust's Articles of Association.

**h) Has any due diligence regarding Hurstpierpoint College finances been undertaken by either the Diocese or school to support this proposal?**

Governors have analysed the College accounts, which are available for public viewing on the Charity Commission and Companies House websites.

The College is in a strong financial position, generating significant surpluses which are primarily reinvested into the site. Future financial position is forecast to be strong; pupil numbers are at their highest point and the College is significantly oversubscribed for future intake years. Governors have no concerns of the College's ability to enter into this arrangement.

- **Are you able to explain what the criteria is for entry to this multi-academy trust? Is it restricted to Church of England Schools? How many schools is it envisaged will eventually join this MAT?**

The Trust is in early discussion with a small number of local Church schools. The Trust will be small by design, limited primarily (but not exclusively) to Church schools within a 15-20 minute journey of the College.

Whilst a level of growth is desirable to ensure sustainability, HET wishes to maintain a family feel where schools work collaboratively with each other and therefore the optimum number is considered to be 7-9, although no timeframe is set for this growth.

- **School staff are key to the success of the school and its pupils. It is likely that should staff not be supportive of these proposals then parents too are unlikely to back them. Please can you explain how staff consultation results will be communicated to parents prior to the final decision being taken?**

Both parents/carers and staff are key principal stakeholders of the school. Their views, as well as those of other school stakeholders, will be taken into account by governors when making the decision on whether to join the trust.

During the second half of the stakeholder consultation process, all stakeholders will be asked to submit their views on the consultation. This will include requesting they are indicating whether they support, are unsure, or do not support the proposals. Respondents will be asked to identify as a member of staff, a parent or carer, or other stakeholders, to ensure governors have a good understanding of how each of the stakeholder groups feel. Whilst not a binding vote, it is only likely that governors will proceed should the school community broadly support the proposal.

- **Given that the proposals put forward will see the school converting to an academy in 2022. Please can you explain how the views of parents of children who will start St Wilfrid's in September 2022 will be factored in as they were unlikely to be aware of these proposals at the time they applied?**

For prospective parents, our proposal to join the HET has been shared with local nursery schools and the school has ensured that all details of the consultation are available on its website.

- **Will there be any change to the school meal provider and provision of free fruit?**

It is not intended to make any change to the school meal provider (or any related provision) at the point of proposed transfer. The school, through the Local Authority, is in an existing contract with the current meal provider. As with all such contracts, the school has the option to consider alternative provision at the end of the existing contract and if this was the case, the Trust would support the school in any required procurement.

- **Will there be any changes to the policy for parents taking children out of school during term time?** The policies for taking children out of school during term-time are delegated to the school and there is no proposal to make any changes.

- **Given HET and Hurstpierpoint College are separate legal entities are written agreements in place to guarantee minimum access levels to College facilities, such as swimming, science lab, cricket pitches etc by St Wilfrid's as a HET school?**

There will be a Service Agreement in place between the College and the Trust to allow for ongoing access to the Hurst College facilities. Each school will

utilise the site (and other facilities) in different ways, depending on the need and desire of each individual school.

- **What track record does the HET central team have in moving maintained schools from Good to Outstanding? Is there a plan available that details this journey? Shared values and joint working is of course great, but what are the specifics and proposed timescales to reach Outstanding?**

All members of the HET central team have leadership experience in a maintained school environment in their respective areas.

Specifically for St Wilfrid's, HET has contracted a School Improvement leader with substantial experience as a Headteacher and trust CEO in taking primary schools to Outstanding. He is also an advisor to the DfE and has previously sat on the regional Headteacher Advisory Board. The work, which is without prejudice to the conversion of the school, has begun and will shortly result in a detailed roadmap.

If St Wilfrid's was to convert to academy status, the school would be inspected in the third year (e.g. 2025) and this would provide a realistic starting point to reach the Outstanding target.

- **The FAQs say "Staff remain in their current pension scheme with no change to benefits." For clarity, does this mean that there of no fund manager, asset transfers and investment portfolio profile changes, as a direct consequence of the conversion to an academy. So no impact whatsoever to the value of our pension fund and its ongoing management?**

Both teaching and support staff will remain in their respective pension schemes. Both schemes are defined-benefit, and in the case of the TPS there is no investment or fund managers. The LGPS will remain with West Sussex, which is administered by Hampshire County Council, however, it is important to note that the performance of the fund does not directly impact the benefits staff accrue, as these are defined benefit schemes based on clearly published accrual rates.

- **The FAQs make no mention of other potential academy options, such as joining with Harlands, Holy Trinity, Bolnore, other local village schools, Oathall. Presumably, these have been dismissed. What makes the HET offering more attractive? The Governors say lots of due diligence has been undertaken - can staff see this?**

As a voluntary aided (VA) school, St Wilfrid's can only join - or set up - a church majority Trust. This limits our options of potential partners to a very small number of established Trusts, none of which we consider to be the ideal partner for St Wilfrid's. Setting up a new Trust on our own is no longer an option supported by the DfE, and doing so with other local Church schools would create excessive workload detracting from our core purpose.

Governors have identified that the HET is a Church Majority trust, with the

majority partner being the Diocese of Chichester.

In terms of due diligence, governors first explored in detail all options open to the school: soft federation, hard federation, joining a MAT, buying in services and 'Do nothing' (i.e. remain Voluntary Aided). In July 2021 governors unanimously voted to begin two-way due diligence with the HET. The areas of particular focus for due diligence include: school improvement, staff terms and conditions, financial implications, scheme of delegation, support services, church school status, cultural fit and the long-term sustainability of the school. Due diligence has been thorough and is ongoing.

- **The Diocese of Chichester Trust has around 14 schools, with many converting a number of years ago. Having looked on Ofsted, I can't see any at "Outstanding". Mr Manly, Head Teacher, Hurstpierpoint College, is on the DCAT Trust Board. Can Mr Manly highlight how HET will develop St Wilfrid's into an "Outstanding" school. What will be the same or different to the approach to the DCAT schools?**

DCAT has historically focused on rapid turnaround, taking schools that have been judged by Ofsted to be in "Special Measures", "Inadequate", or "Requires Improvement" in often highly challenging areas, and improving them to "Good". DCAT are highly successful in this approach and there are a number of schools within the Trust which have improved both from an Ofsted judgement but also in progress and attainment.

The HET is instead focussed on enabling schools to continuously improve, with one aim being that schools within the Trust become judged Outstanding and - beyond the Ofsted judgement - provide a genuine outstanding experience for the children in the schools.

- **Under the WSCC umbrella, all schools contribute to a Schools in Financial Difficulty Fund. As HET is new, presumably no such fund, with reserves, exists? If there are a limited number of schools joining HET, how does it propose to assist future schools if they get into trouble (for example, due to falling pupil numbers). Will Hurstpierpoint College provide any support? If another school in HET struggles, would the HET call on St Wilfrids to provide support?**

All schools within the HET will have a responsibility to set balanced budgets, taking into account all known future variables. In the event of a falling roll, schools would be expected to plan in advance and modify their budget accordingly and thus avoid a deficit situation.

In extremis, the school may be able to call on the Trust for short-term financial support, in a similar way to the LAs licenced deficit scheme.

- **The FAQs say "The Hurst Education Trust will make a charge (3% of core funding) to provide services for its schools, replacing services which schools currently purchase from West Sussex County Council and other providers."**

**Please can HET clarify/list the specific services that will be provided through the 3% central charge?**

**The FAQ says savings will have been identified. If staff T&Cs remain unchanged, then presumably the savings are from cheaper services. Can the HET say where these services savings are coming from, and that quality of services won't be impacted as a consequence?**

The majority of MATs provide a range of educational and non-educational (back office) support services to schools within the Trust. HET is no different and will provide an educational school support service in addition to a wide range of back-office services, including but not limited to: Finance, HR, payroll, Health & Safety, Data Protection, IT and Premises. These services will be provided to the Trust at nil cost by the College. The central team of the Trust will be provided by the College at nil cost. Therefore, the HET does not carry the central overheads that most MATs do and is able to pass on these savings to the member schools by way of a reduced management charge.

- **Is there any commitment from HET to keep the central charge at 3% for future years? A move to 7% (the FAQ says that some other Trusts charge at this level) would increase this charge to St Wilfrids to circa £120k – significantly higher than the current position. I do not believe this would represent Best Value for the school.**

The College has committed to providing the services detailed to the Trust at nil cost. The central team of the Trust will be provided by the College at nil cost. Therefore the HET does not carry the central overheads that most MATs do, and is able to pass on these savings to the member schools by way of a reduced management charge. Whilst it is impossible to predict the long-term future, the 3% charge has been set at a realistic level based on the long-term provision of these services from the College.

- **What harmonisation will there be of pay, T&C's and benefits of current staff of St Wilfrid's and those new staff which join the school after we have joined the Trust? I.e. will a grade 3 TA, who is TUPE, have the same pay, T&C's etc as a grade 3 who starts after the school has joined the Trust? Will staff of the same grade be on the same pay, benefits etc across all schools in the Trust? How are future pay rises determined?**

**As the Trust is a new one and, according to their website, the first school is not due to join until March 2022, what guarantees are there that they can deliver what they say can?**

The Trust have committed to follow national terms and conditions for both existing and newly appointed teaching and support staff. As schools are expected to join the Trust from both East and West Sussex Local Authorities



(where each operate slightly different pay scales for support staff) the relevant pay scales at each school will be kept. It is possible that a pay harmonisation exercise may need to be undertaken in the future to comply with equality regulations, although this would be at no detriment to staff.

As part of the due diligence, Governors have met with the Trust central staff to establish their track record and experience in running schools and trusts and improving maintained schools. As an early joiner, St Wilfrid's is in a much stronger position to negotiate specifics of any proposed arrangements than if it were to join an established trust.

- **How will this affect my pension and pay terms and conditions?  
How will this affect my role as subject lead and TLR point?  
Will there be opportunities to work at other schools in the academy?**

There will be no changes to pension, pay or terms and conditions resulting from the transfer of the school. This includes any existing roles and pay points.

There may well be opportunities to work across other schools in the trust, although this would not be directed and would be with agreement of any staff member.

- **What other schools are considering joining this trust?**

To date, both Albourne CE Primary School and Ditchling (St Margaret's) CE Primary School have consulted with parents and staff on proposals to join the Trust. Following consultation, both Governing Bodies unanimously decided to join the Trust and are now in the formal stages of transfer.

- **How will admissions policy/criteria change?**

The Admissions authority will become the Hurst Education Trust. In practice, however, the School's governing body will retain delegated powers to review the policy and criteria - as is the case now. There are no anticipated changes.

- **Is this Trust only for Church schools?**

The Trust has been set up primarily, but not exclusively, for Church schools in the Mid Sussex area as many will have few MAT options if they are considering becoming an academy.

The HET would welcome discussion with community schools wishing to consider joining. Community schools would need to ensure they were comfortable operating within the Trust's vision.