

## JOINING PETERBOROUGH DIOCESE EDUCATION TRUST FREQUENTLY ASKED QUESTIONS

These FAQs aim to provide your school with the relevant information of what joining Peterborough Diocese Education Trust (PDET) will mean for your school.

### CONVERTING TO ACADEMY STATUS

#### What is an Academy?

Academies are independent, state-funded schools, which receive their funding directly from central government, through the Education and Skills Funding Agency (ESFA), rather than through a local authority.

If your school is a church school and it converts to an academy it will automatically retain its religious designation.

#### What is a Multi Academy Trust?

PDET is a Multi Academy Trust (MAT) which has been approved by the Department for Education (DfE) as an academy sponsor to operate a number of academies under a single charitable company.

The Board of Directors of PDET are responsible for decisions relating to how each academy operated by PDET is run, from the curriculum to staffing. The Directors key responsibilities are:

1. To ensure the quality of educational provision;
2. To challenge and monitor the performance of the academies;
3. To comply with the terms of its Funding Agreement with the Secretary of State for Education; and
4. To manage PDET's finances, property and assets.

The Board of Directors of PDET will ultimately be accountable and responsible for the performance of your school to the DfE, through its Funding Agreement with the Secretary of State for Education.

Each school which joins PDET has a Local Governing Board to which certain functions are delegated by the Board of Directors (more detail below).

#### What is the constitution of PDET?

Multi Academy Trusts are constituted as companies limited by guarantee. They are also charities.

The constitution of PDET is contained in its Articles of Association, which regulate how it manages its formal business.

#### What are the benefits of converting to an academy and joining PDET?

PDET sets a strong, shared strategic vision across all the academies in its trust, and can enable its academies to have better access to resources and support through economies of scale.

Other benefits of joining PDET include the following:-

- PDET's MAT structure is a strong, widely recognised and used collaborative structure which aids academies to be mutually supportive in raising educational attainment.
- PDET's MAT structure allows for an increase in shared knowledge and good practice across the academies within PDET.
- PDET enables economies of scale to be obtained in procurement of goods and services as there is only one company, PDET, which contracts on behalf of all the academies within PDET. Procurement would become less burdensome for your school.
- Consolidation and forward planning – your school's formal commitment to join PDET allows for the adoption of long-lasting arrangements leading to long term viability and effectiveness.
- Help and support between staff at PDET academies which releases time for strategic planning, better use of resources and benefits of economies of scale. Each PDET academy maintains its own unique identity but we believe that by working together, we can achieve more than by each academy working alone. Our academies seek to serve their local communities; they are inclusive welcoming children of the Christian Faith of other faiths or of no faith, children from all backgrounds and of all abilities. We believe in the infinite worth of each person: children deserve the very best education and staff deserve support to deliver this.

Research has shown the following benefits of the MAT structure:

- Financial savings through economies of scale and improved recruitment and retention of staff. PDET employs its own HR Manager to advise on appointments and we encourage Local Governing Boards to advertise senior posts internally first.
- Improved qualities of leadership/creative leadership/management and increased quality of specialist support. A Headteacher wishing to take a phased retirement at one PDET academy shared the headteacher role with her deputy for a year preparing the deputy to take on the headship fulltime. This enabled a smooth and seamless transition.
- Enhanced opportunities for CPD centrally organised and funded.
- The MAT structure can create a climate for further innovation.
- Wider range of curriculum opportunities for pupils, and improved capacity to provide extended services across the academies within the MAT. PDET offers a programme of enrichment events including a Year 6 Transition Day at the Cathedral and a maths enrichment day.
- Greater collaboration between back office staff resulting in improved reporting and increased support for Headteachers and Local Governing Boards

### **What would be the timescale and process for conversion?**

The DfE estimate that it usually takes between 4-5 months for a school to convert to an academy.

Please see the flowchart at **Annex 1** for an overview of the conversion process.

Should your school decide to join PDET, we would work closely with your school through the conversion process providing project management, and support to make the conversion process as seamless as possible for your school.

### **If we convert will we lose our individuality?**

We recognise that schools have their own unique identity, and we want to celebrate this. We see this as a key benefit of being part of PDET. There is currently no expectation that your school's uniform, name or its distinctiveness would be altered as a result of your school's conversion.

### **Can our school leave PDET if the relationship has broken down irreparably?**

Both sides should be committed to making the partnership work. At the moment there is no straightforward process for an academy to leave a MAT, although if the relationship between PDET and your school were to break down irreparably, then we would, of course, sit down with your school (and DfE and the relevant office of the Regional Schools Commissioner) to try to resolve matters, and to explore options. Our interests are all aligned in that we all, ultimately, want what is best for the pupils attending your school.

### **What would happen to the ownership of our school land and buildings if our school converted to an academy?**

For church schools, the land and buildings remain with the site trustees, usually the Diocese. The site trustees enter into a DfE model document, a Church Supplemental Agreement, which grants rights to occupy the land. The playing fields are typically held by the local authority and a long lease (125 years) based on the DfE model lease would be granted by the local authority to PDET.

## **THE RUNNING AND MANAGEMENT OF YOUR SCHOOL IF IT JOINS PDET**

### **What will conversion mean in terms of the running and management of our school?**

If your school joins PDET, PDET would become the employer of your school staff, and would be responsible for the overall effectiveness of your school. PDET is accountable to DfE through its Funding Agreement, and must meet certain defined standards. Your school would continue to be monitored by Ofsted and SIAMs.

### **What changes will there be to the constitution of our Governing Board?**

All Academy Trusts have at least two layers of governance, the Members (equivalent to Shareholders) and the Directors who are responsible for making sure that the Academy Trust achieves its objectives. The Members are responsible for the strategic oversight of the Academy Trust. They are the conscience, ensuring that the Academy Trust's objectives are upheld.

The Members of PDET are the Diocese of Peterborough, up to two nominees appointed by the Diocese of Peterborough and the Chair of the Board of Directors. The Members appoint PDET's Directors.

The Directors of PDET determine the policies of the MAT, make judgments about the effectiveness of individual academies operated by PDET, manage central services,

and report to the Regional Schools Commissioner. The Directors work with academies within PDET to ensure they are performing to their best ability, and that the academies get the support they require.

PDET also has a third layer of governance. Each PDET academy has a Local Governing Board to which certain powers for the day to day running of the academy are delegated. Local Governing Boards have a similar status to committees of a maintained school's governing board. Powers are delegated by the Directors on the basis of 'earned autonomy' i.e. generally, good and outstanding academies have a greater degree of delegated powers than weaker academies, who gain increasing powers and autonomy as they improve.

We envisage the Governing Board of your school becoming the Local Governing Board. The Local Governing Board for your school would have responsibility for all decisions that solely affect your school including control over its budget. These responsibilities would be set out in the formal scheme of delegation between the Local Governing Board and the Board of Directors of PDET.

Whilst PDET Local Governing Boards usually have delegated authority to run their academy, the Directors of PDET are ultimately responsible for all of the academies it runs.

The Directors of PDET are responsible for appointing all Governors. Staff and parent Governors are appointed following election in the normal way and Foundation Governors are appointed by PDET, following the nomination and consultation procedures currently in use. Co-opted Governors are appointed by PDET following submission of a business case for their appointment from the Local Governing Board. On conversion we would work with you as to the constitution of your Local Governing Board. (For example, Local Authority Governors usually become co-opted Governors).

### **How would admission arrangements change once our school became an academy with PDET?**

PDET becomes the Admissions Authority for the Academy. This means that the admission criteria can be altered (provided they are in accordance with the School Admissions Code). PDET does subscribe to the view outlined in the Church of England Vision for Education (2016) that church schools primarily exist to serve their local community. .

As far as the administration of admissions is concerned, Academies are in the same position as VA schools are currently. The Local Authority (LA) co-ordinates the process. All applications are received by them. In late Jan/early Feb., they send an electronic file to schools/academies of all the applications they have received and the school/academy has to rank them according to its admission criteria and return them to the LA. The Diocese provides training for school/academy staff on how to do it. The LA continues to send out the offer letters to parents.

### **How would appeal arrangements change once our school became an academy with PDET?”**

PDET is responsible for setting up appeals for its Academies. The Diocese already has long-established arrangements in place for appeals. Academies will need to prepare a “Statement of Case” in advance of the appeal and field a “Presenting Officer” (Governor or senior member of staff) for the appeal itself. Again, the Diocese provides training on these responsibilities and has template Statements of Case which academies can populate quickly and easily.

### **Who will set the vision for our school? The Local Governing Board or PDET?**

PDET determines the vision for the Trust and the academies formulate a vision in line with this.

## **FINANCIAL MATTERS**

### **What are the financial implications of converting?**

We do not promise that a school will be financially better off following academy conversion. However, there are increased opportunities for efficiencies and the buying power of a trust with thousands of children is greater than a school with hundreds. We have a number of examples where we have been able to find savings for our academies through trust wide procurement.

Maintained schools and academies are funded through the same funding formula. The key difference for academies is that your school’s funding will come straight to PDET for your school, not via the Local Authority, and your school will have more freedom to decide how it spends its money. Schools have become used to a Local Authority “top slice” for the provision of services, this does not exist when your school becomes an academy. Instead, PDET charges 5% for the central support services provided to all of our academies.

Your school would, of course, have to buy, as and when required by it, services which had previously been supplied by the Local Authority as part of the top slice, where they aren’t included in the PDET central support services.

### **What will this 5% cover and what services will be provided from this?**

PDET tries to make the 5% stretch as far as possible and the central support charge does, at least, cover all of the responsibilities of an employer such as HR and payroll administration as well as Headteachers’ performance management; finance (accountant, auditing, budget setting support); some Governor services; monitoring and supporting school effectiveness through regular visits from an Academy Improvement Officer (AIO); promoting educational improvement by facilitating academy to academy improvement and organising CPD opportunities such as trust wide training opportunities A full list of these central support services can be found on [www.pdet.org.uk](http://www.pdet.org.uk)

In addition, the 5% covers gold level membership of the Diocesan Service Level Agreement and all the benefits that includes.

Additional benefits will be access to benchmarking and group procurement for other services, i.e. ICT support; software; licences; SLAs etc which should bring financial savings for your school.

**For those services we have to pay for separately, will we have to use suppliers recommended by PDET, or will our school be able to buy-in services from elsewhere if they chose?**

In most cases, PDET academies will be free to choose their own suppliers for services outside of the PDET core responsibilities, but will be expected to follow the PDET financial regulations on purchasing (i.e. like for like quotes above a specified value etc). PDET will be able to broker relationships on behalf of its academies that offer reduced costs and a single point of contact. In due course, it may be appropriate to consider whether there are any areas where jointly procured services might be beneficial to PDET and its academies both financially and in terms of quality of service.

**Could this percentage be increased by PDET?**

We are committed to trying to hold the central services' charge to 5%, any increase to the 5% would be due to an unavoidable increase in the cost of providing services to PDET academies. Academies would be consulted on any proposed increase, and would receive good notice of any increase, and would have the opportunity to build it into their budget.

**Will we receive any additional resources in terms of money or support?**

The additional support will come from PDET central staff, such as, the Business Director, CEO, Legal Advisor, Director of Learning and Teaching and HR Manager.

PDET was granted a Sponsor Capacity Grant from the DfE, and the Diocese matched this to set up PDET initially. PDET has also been successful with a number of applications to the Condition Improvement Fund and the Regional Academies Growth Fund.

**How much say do individual academies have in their own budgets?**

Individual academies will still set their own budgets with assistance from the PDET Finance Team. Budgets will need to be signed off by the Academy's Local Governing Board, and then the PDET Board, prior to formal submission to the ESFA.

**Can a school with a deficit budget convert?**

Conversion with a deficit is largely in the hands of DfE. A school with any size deficit would need to have a recovery plan in place and agreed by the DfE before they would allow its conversion.

**Will our school have to employ an accountant at great expense?**

Many academies either already employ a fully qualified bursar or will be able to use the opportunity of being part of PDET to share the resources of one across PDET's academies.

PDET academies do not need to employ a full time accountant; PDET has an accountant who would work closely with your school's finance personnel on financial matters.

## TEACHING STANDARDS

### **Will we still have Ofsted and SIAMs visits?**

Yes, Ofsted is responsible for monitoring academies and SIAMs inspections will continue.

### **What will be the process should our school's results drop, or an Ofsted report following inspection suggests improvement?**

PDET is responsible for overall academy performance. PDET will continually monitor standards, and would aim to intervene before an Ofsted inspection if pupils were not making the required progress. PDET would support the academy's action plan to improve outcomes for pupils and broker external support, if required. Equally, this is a two way process and we would expect academies to notify PDET of any issues.

It would also be the responsibility of PDET to ensure developments listed in an Ofsted report and section 48 report are made.

### **Are there benefits of conversion in terms of educational outcomes?**

Evidence suggests that schools working together in formal partnerships leads to improved standards. Joining PDET will give you increased opportunity to collaborate with other academies within our MAT.

### **What changes will there be to the curriculum taught?**

Academies do not have to teach the National Curriculum. However, they must teach a broad and balanced curriculum including English, mathematics, science and religious education. We would discuss any proposed curriculum changes with your school, but be assured that changes would only be made where they are in the best interests of the pupils.

PDET co-ordinates and promotes its academies working together more closely to encourage curriculum innovation and sharing of good practice.

## STAFF

### **Will staff still be employed by our school or will staff contracts be with PDET if our school converts and becomes a PDET academy?**

The conversion to an academy within PDET will involve a transfer of staff under TUPE. If your school joins PDET, PDET will become the employer of the staff and all staff contracts will be with PDET.

PDET appoints senior staff (Headteacher/Deputy Headteacher), but other appointments are delegated to your Local Governing Board.

### **Is there still a need for a Bursar in each School?**

Most PDET academies still have their own Bursar, however we are always looking at how we can provide the best support possible to our Headteachers and Local Governing Boards. This could involve greater centralisation of services.

### **Will there be a change in the salary scales our school employees are currently on?**

Staff will transfer on no less favourable terms and conditions. Any necessary amendments in the future would only be following consultation with staff and unions.

### **Who decides the Pay & Conditions for each school?**

As discussed above, your school staff would transfer to PDET on no less favourable terms and conditions and any necessary amendments in the future would only be following consultation with staff and unions. No changes to terms and conditions will be made as a result of your school becoming part of our MAT, to date, PDET has honoured all nationally proposed pay recommendations. Of course, we all recognise that things can change in any school (academy or not) over time.

### **What will be the progress for staff progression – performance management? Will there be other opportunities?**

There will be a range of opportunities for staff training and staff progression, and we see this as a major advantage of schools joining PDET. PDET is responsible for the performance management of Headteachers.

### **What is the situation regarding teacher and support staff pensions once our school becomes an academy?**

Teachers working in an academy fall within the scope of the Teachers' Pension Scheme (TPS), just as if they were employed in a local authority maintained school. Staff transferring from a maintained predecessor would simply continue their membership of the Scheme. As the employer, PDET is responsible for remitting contributions to the TPS and for all other administrative responsibilities that fall to employers who employ teachers who are subject to the teachers' pensions regulations.

PDET will also ensure that the Local Government Pension Scheme (LGPS) arrangements stay in place for non-teaching staff. As part of the conversion process, the LGPS scheme's administrators will undertake an actuarial assessment to determine how much PDET will need to contribute and the terms of that contribution.

In short, your school's staff will not see any impact on their pensions because of the conversion to academy status. Continuity of service is retained when staff transfer to an academy. PDET's funding agreement requires it to ensure that all staff employed by it have access to the TPS or the LGPS (as applicable).

### **What about union recognition?**

Trade union recognition will transfer under TUPE.

## Annex 1

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### Academy Conversion Step-by-Step Plan

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**Step 1:** Register your school's interest in converting to an academy with PDET using the DfE's online form which can be accessed here:

<https://www.education.gov.uk/schools/leadership/typesofschools/academies/register-school>

**Step 2:** Your school starts its consultation with key stakeholders<sup>1</sup> to join PDET. PDET will support the school through this process.

**Step 3:** The Governing Board of your school meet to consider the outcome of the stakeholder consultation. The Governing Board of your school resolve to convert to an academy with PDET. Conditional consent from the Diocese will be required at this stage to permit the application to convert.

**Suggested wording for your minutes:**

*Schools choosing to become an academy:*

*'The Governing Board requests that the Secretary of State issues an Academy Order to enable xxxxxxx to become an Academy as part of Peterborough Diocese Education Trust'*

*Schools that are compelled by the Secretary of State to become an academy:*

*'The Governing Board requests that the Secretary of State issues an Academy Order to enable xxxxxxx to become an Academy under the sponsorship of Peterborough Diocese Education Trust'*

**Step 4:** The Secretary of State approves your school's proposal to convert to an academy with PDET and makes an Academy Order.

**Step 5:** The TUPE consultation process commences. If you are a VC school, the Council leads on the process. If you are a VA school the governing board leads on the process. In both instances, PDET fully support the process throughout.

**Step 6:** Your school would work closely with PDET to prepare the legal documentation to convert your school to an academy. This would involve the following actions on your, and our part:

- **Due Diligence:** assisting PDET in carrying out a property, staffing governance and commercial due diligence exercise. The earlier

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<sup>1</sup> A Stakeholder consultation is required by the Academies Act 2010.

this is started the better. PDET would lead on this process and would provide project management support to your school.

- **Property:** assisting PDET to work through and agree the property arrangements on conversion. The process and legal documentation depends on the type of School and the land interest held by your school.
- **TUPE:** completing the TUPE consultation process.
- **Funding Agreement:** working with PDET to prepare your school's Supplemental Funding Agreement.
- **Commercial Transfer Agreement:** PDET would lead on negotiations of the commercial transfer agreement. Your school is party to this agreement which formally transfers the assets, contracts, staff and undertaking of your school to PDET.

**Step 7:** PDET, the Local Authority and the Governing Board of your school enter into the Commercial Transfer Agreement and land documentation.

**Step 8:** PDET and the Secretary of State sign the Supplemental Funding Agreement for your school.

**Step 9:** Pre-opening actions

- PDET works with your school to ensure that enhanced DBS checks are up-to-date.
- PDET works with your school to ensure that financial systems and insurance are in place.

**Step 10:** Your school opens as a PDET academy.