



Wise Owl Trust
Service Level Agreement
2019/2020

AGREEMENT BETWEEN WISE OWL TRUST AND TRUST SCHOOLS

Aim of Agreement:

- To ensure that the sponsor meets its legal obligations to maintain and improve educational and financial standards across the Trust.
- To provide Trust academies with leadership, financial and business services to support the development for the academies across the Trust. This excludes any additional support that might be negotiated with individual academies.

Partner details:

Provider: Wise Owl Trust

Recipients: Briscoe Lane Academy, Old Hall Drive Academy & Seymour Road Academy

When the agreement takes effect: 1st September 2019

Review date: 31st August 2020

The provider will ensure that central staffing support is provided as per Appendix 1

Resources to be provided:

Staffing:

- Chief Executive Officer
- Executive Principal
- Trust Finance Director



- Trust Subject Leaders (as appropriate)
- Inclusion Lead
- Human Resources Lead

Additional Resources:

- External School Improvement provider
- QA visits
- Educational Psychology support
- Play Therapy
- Central HR support
- ICT Curriculum Support – Specialist provision
- Staff Wellbeing Support
- External Finance support/HCSS software licenses
- Auditors Fees
- Internal Audit and Peer Review
- GDPR compliance

Additional support as deemed appropriate by CEO/Executive Principal



Empathy

Excellence

Empathy

Excellence

Resilience

Passion

Self-Aware

Resilience

Passion

Self-Aware

Communication

Teamwork

Communication

Teamwork

Costs:

The Trust academies will receive this support as part of the central contribution levied across all the academies within the Trust. The cost for 2019/20 is 8% of GAG and EYFF funding and is to be reviewed annually. Central salary costs amount to 5.5% of the top slice. The remainder is used to pay for external service providers and Trust projects. This was agreed by Trustees including Chairs of Local Governing Bodies. Additional services from the Trust can be negotiated at an agreed rate between the schools.

How charges will be levied

The Trust will issue a schedule of payments and this will be taken by bank transfer around the 10th of each month. Wise Owl Trust will provide the projected costs for each financial year in line with budget preparation timescales.

Monitoring Arrangements

The Trustees are to consider the effectiveness of the support provided. The Chairs of the Local Governing Bodies will be part of this review. Performance Management to monitor the performance of staff will be undertaken according to agreed line management structures. Supporting evidence may be requested from the Principals or Finance staff of the schools within the Trust.

DBS Clearance

All staff visiting other schools on a regular basis will register their DBS details with the academies within the Trust.

Changes to the Agreement

In the event that Wise Owl Trust wishes to increase or decrease the staffing levels or change the % top slice, this is to be done by agreement with the Trustees from the beginning of a financial year or by negotiation if within the financial year.

This agreement signed by:

_____ (Chair of Wise Owl Trust)



Name of Academy: _____

Chair of Governors: _____ Name: _____

APPENDIX 1 – SERVICES

Chief Executive Officer	CEO	<ul style="list-style-type: none">• Accounting Officer• Manage the expansion of the Trust including conversion.• CIF capital grants – bid applications and monitoring.• School2School support and LLE.• Lead role in key plans and documents such as the Trust’s long term strategic plan, self-evaluation and school improvement plans of the academies.• Performance management of Executive Principal, Principals and Trust Finance Director.• Providing motivational and inspirational leadership at all levels of the organisation.• Meeting demands of changing legislation, new initiatives and changing practice.• Contributing to the formulation of the Trust’s strategy.
Executive Principal	EP	<ul style="list-style-type: none">• Development of the leadership of academies across the trust, including principal appraisals.• School2School support.



		<ul style="list-style-type: none"> • Lead role in key plans and documents such as the Trust’s long term strategic plan, self-evaluation and school improvement plans of the academies. • Responsible across the MAT for the key development objectives, the curriculum developments, the ethos and how it can be maintained and to lead the strategic direction of the MAT. • Performance management for Principals, HR Lead and Inclusion Lead • Responsible for developing the Trust School Improvement Team.
Executive Leadership Support	CEO EP TFD HR INCL	<ul style="list-style-type: none"> • Provide the Trust board, LGBs and SLTs with sufficient information such that informed decisions can be made on MAT developments. • Develop harmonised HR & Finance policies in line with current requirements. • Carry out staffing and HR reviews across the Trust. • Monitor educational standards include target setting, develop consistency and share good practice across the Trust. • Oversee intervention plans: T & L reviews, pre inspection interviews. • Co-ordinate all school improvement strategies and hold leaders to account. • Improve leadership capacity: develop future leaders, teachers and groups of practitioners across the trust, support for principals and other senior staff appraisals • Provision of external school improvement support
Financial Management	TFD	<ul style="list-style-type: none"> • Work with all schools to ensure they meet ‘going concern’ requirements. • Lead the finance teams to ensure appropriate policies, structures and standards are in place in light of new status and consolidated audit requirements. • Provide training as required.



		<ul style="list-style-type: none"> • Budget monitoring of all schools within the Trust including regular meetings with Principals. Report to Chair of Trust monthly. • Ensure correct use of central funds. • Monitor the investment policy of the Trust. • Peer Review across all academies within the Trust.
Trust Finance System support	TFD	<ul style="list-style-type: none"> • All schools within the Trust to use FMS software – academy version • Provision of technical support for FMS issues • Amendments to structure of system to support individual school requirements • On-going finance training as required
Month end support	TFD	<ul style="list-style-type: none"> • To ensure all schools follow the same procedure, month end support will be provided and monitored. Central review of month end data.
VAT returns	TFD	<ul style="list-style-type: none"> • All schools to forward monthly VAT returns to MAT for processing via VAT 126.
Fixed Assets	TFD	<ul style="list-style-type: none"> • Central management of fixed assets and depreciation
Audit	TFD	<ul style="list-style-type: none"> • Audit preparation and liaison with external auditors
EFA Financial Returns	TFD	<ul style="list-style-type: none"> • Prepare all financial and budgetary returns required by the ESFA within agreed timescales
Use of Assets	CEO TFD EP	<ul style="list-style-type: none"> • Manage capital bids for the Trust • Work with academies to investigate any opportunities for income generation/access to grants • Work with academies to identify opportunities for collaboration
Marketing	EP HR	<ul style="list-style-type: none"> • Develop and maintain a central website for the Trust

