

ACHIEVING EFFICIENCIES IN MULTI-ACADEMY TRUSTS 2019

Centralisation: a MAT case study

How do you balance autonomy, accountability and value for money in your MAT? **Karen Sayers** talks about centralisation and efficiency at Partnership Learning

Partnership Learning's motto is 'Excellence for All'. The trust's vision is to maximise social mobility, giving pupils the same opportunities as most favoured peers. They provide local support for schools in difficulty, and maintain a family of schools alongside the LA.

Partnership Learning is currently responsible for nine schools and 5,000 pupils, across three LAs. They are heavily involved in the free schools programme, with four already open, a further three approved to open and more bids in progress.

Karen Sayers is chief operating officer at Partnership Learning. She's been involved in the trust from the start, having previously been business manager at The Sydney Russell School in Dagenham, a founding school in the trust. Karen is also an ISBL fellow and one of the DfE's new school efficiency advisors. At the Effective Financial Management in Uncertain Times conference, Karen spoke about how Partnership Learning provides value for money through centralised services for its schools.



What's centralised at Partnership Learning?

All of the trust's schools buy into some central services:

- finance
- HR/payroll
- school improvement
- governance
- assets.

There is a business manager within each school, but the central team provides expertise where specialist advice is needed, for example accountancy support, or the services of the premises team.

The central team consists of:

- chief executive
- chief operating officer (including HR)
- director of finance
- director of development (p/t 0.4)
- director of assets
- director of ICT
- director of school improvement (secondary)
- director of school improvement (primary) (p/t 0.4)
- attendance lead and assistant
- facilities management services lead
- ICT technician team
- administrator x 2.

Schools can opt into further services, such as attendance and ICT. The trust also sells these services to other schools. There are currently 26 schools using the ICT service, with a central ICT team of 13 people (including IT apprentices).



A per pupil charge

Unusually, the trust doesn't top slice from their schools' budgets. Instead they charge a per pupil fee (£75.00 in 2017-18; planning to reduce to £65 in 2018-19).

The trust makes use of bought-in services where they think it offers best value for money. For example, they buy in HR and clerking services from [EES for Schools](#) (which is owned by Essex County Council).

The trust's aim is to cut the core subscription fee every year. They can do this by growing the number of schools in the trust, as well as by selling services both inside and outside of their MAT. The trust has 'levels of expectations' (SLAs in all but name) for the services they provide, even the compulsory buy-backs such as payroll and governance.

Balancing autonomy and accountability

Schools in the trust have flexibility in many areas. For example, how they run performance management. However, heads in individual schools cannot sign contracts.

But schools use consistent documentation. The benefit of this was particularly noticed recently with a business manager on long-term sick in one school. Another business manager has been able to cover part-time, and with the same documentation being used, it's easy to pick up what's going on.

The headteachers and business managers in the individual schools manage their own budgets. Of course, there are checks in place and the central team can see the budgets and raise any issues.

Termly business manager meetings play a key part in keeping schools and the trust in touch, with the business managers giving frank feedback about the services the trust is providing.



Plans for the future

Centralisation is a process: you cannot (or at least it's not advisable to) do everything at once. Partnership Learning doesn't currently have a centralised back office team, and there's a recognition of the need to balance the drive for efficiency with the upheaval that restructures and changes can bring.

They have a centralised photocopying service, and Karen's next project is a review of cleaning services. She will be weighing up the pros and cons of tendering out, bringing it in-house, or maintaining their current local authority contract. It's always about getting the best value for the Partnership Learning schools.

Challenges

One of Karen's main challenges has been stepping away from the day to day SBM role. She's still based in the school where she was SBM, so both she and the staff have had to learn that she's no longer the person to tell when there's a spillage or something isn't working.

Karen is still learning in her role. Sometimes a perceived lack of specialist knowledge can be a barrier to tackling problems. For example, Karen isn't an accountant, and in the early days of the trust, there was a time when Karen felt they weren't getting the best financial advice, but didn't have the confidence in her knowledge to act on that. Having now nearly completed the CIPFA level 7 certificate in school financial and operational leadership, Karen is ready to tackle anything!

Karen Sayers is chief operating officer at the Partnership Learning trust, an ISBL fellow and DfE school efficiency adviser. Previously SBM at the founder school, Karen's role has grown with the trust.