



# The Oxford Diocesan Bucks Schools Trust

Empowering our unique schools to excel

## Governors' Briefing Pack



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**We aspire for every pupil and adult to 'experience life in all its fullness'  
(John 10:10)**

## Information pack for schools and academies thinking about joining the Oxford Diocesan Multi Academy Trust (ODBST)

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## 1. ODBST - Who we are

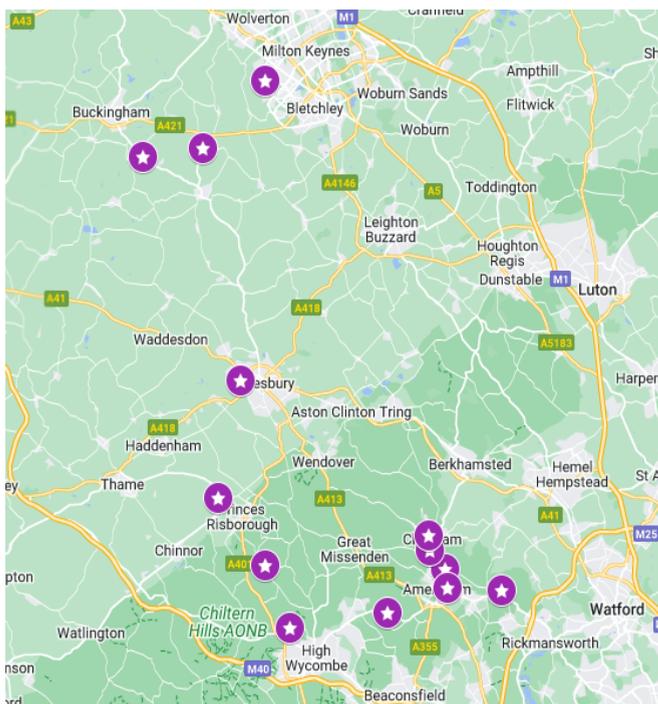
Our organisation, the ODBST, is a Church of England Multi Academy Trust (MAT) which operates in the Buckingham Episcopal area of the Diocese of Oxford. It covers Milton Keynes and Buckinghamshire. We are a MAT with sponsorship powers from the Department for Education (DfE). Our ODBST Trustees welcome applications from all schools interested in joining us: community or Church of England; primary or secondary; mainstream or special. We offer our communities high quality inclusive education, welcoming children from all faiths and none. There are currently 13 Primary schools that are part of our ODBST family. 11 of these are converter academies (5 of the schools were community schools before choosing to join the ODBST) and 2 are sponsored academies. This reflects the powerfully attractive MAT we have developed.

### Our Schools, Our Learners, Our Trust

Our unique schools continue to retain their own character and individual feel just as the individual members of any family make up the whole whilst being individuals. They offer a broad, balanced, and exciting curriculum which allows all children to learn with interest and enthusiasm. Our schools are central to their community but are also committed to working collaboratively with other schools so that we are all able to learn and grow together.

Our learners are at the centre of all we do; empowered to learn and achieve; valued within our schools as resilient, active, and responsible citizens; served so that they develop and thrive (intellectually, socially, culturally, and spiritually); aspire to reach their fullest potential.

The ODBST strives to enable strong and effective local leadership that is supported and challenged to recruit, train and retain high quality staff and we offer career advancement opportunities within our group of schools. Our staff are passionate about giving all pupils the tools to be the best that they can be, providing them a plethora of opportunities and experiences for enriched learning, and working with governors to make key decisions in the best interest of the school community they serve.



### Our family of schools in the ODBST

- ★ Chesham Bois CE School
- ★ Thomas Harding Junior School
- ★ Great Horwood CE School
- ★ Padbury CE School
- ★ St John's CE Primary School, Lacey Green
- ★ Longwick CE Combined School
- ★ Christ the Sower Ecumenical School
- ★ Woodside Junior School
- ★ Curzon CE Combined School
- ★ Elmtree Infant School
- ★ The Downley School
- ★ Chenies School

## 2. ODBST vision, values, and summary of our priorities

### “Empowering our unique schools to excel”

Each of our schools has a unique character of its own and we will work to ensure that this vision embraces all our pupils and adults, regardless of background and belief.

We empower our schools to deliver a broad, enriched, and exciting curriculum, coupled with a shared zest for life and learning.

We have identified 4 core values: **Inclusivity, Community, Service, Empowerment** that resonate with what we believe the ODBST Learner, and Leader should follow and live by. They reflect the values that are central to our schools and the diocese. Through our values, we aim for excellence for everyone in our Trust. Building on the uniqueness of our pupils, families, and school communities, we strive to enable everyone to develop and thrive intellectually, socially, culturally, and spiritually.

**We aspire for every pupil and adult to ‘experience life in all its fullness.’**  
(John 10:10)

### Our ODBST values in action



**Our inclusivity value** will be seen in action when our differences become our strength and achievement.

**Our community value** will be seen in action when pupils and adults are learning, loving, achieving, and flourishing together.

**Our service value** will be seen in action when pupils are seeking the common good in all that they do.

**Our empowerment value** will be seen in action when our pupils are able to say, ‘I am special because...and I am learning to excel at...’



At ODBST this means that everyone is accepted and supported, regardless of faith or culture. **We will strive for everyone to be given every opportunity to reach their potential.** We believe everyone is unique and everyone matters.

Many pupils and staff in our schools will come from diverse home backgrounds and our pupils will be at different stages of their own academic and spiritual journey during their time in school. All pupils will receive support, guidance, and challenge so that they are motivated, ambitious, and courageous individuals who seek to be the best they can be. We embody the experience of an inclusive community, where we share our gifts, where the emphasis is on what we can contribute, rather than on what we might receive and where we give to each according to need.

**“Our differences are our strength as a species and as a world community” Nelson Mandela**





At ODBST we work in unison with all our families. **Together we learn, love, achieve and flourish.** Within our family of schools, each individual is encouraged to discover and grow their talents to their fullest potential. We believe by encouraging, inspiring, and building each other up we secure the best outcomes for every member of our community.

We believe quality relationships and partnerships are a central element of interdependence: all are needed and valued, and each person is important. We will work together to support each other so that everyone can make a contribution, and everyone feels included. We encourage everyone to have a sense of pride in their community and the wider world.

**“The minute we become an integrated whole, we look through the same eyes and we see a whole different world together”**

**Azizah Al-Hibri**





We encourage everyone to look after themselves and others around them. **We encourage pupils in our schools to seek the common good in all that they do through acts of kindness.** The ODBST believes that our gifts and talents are to be used in ways that will improve the lives of themselves and others. We help children to develop skills that will allow them to participate fully and contribute positively to the social and cultural life of modern Britain, maximizing opportunities for our pupils to serve their school and local community. We create a culture where serving one another and the wider community is celebrated and seen as an important mark of character development. We regularly invite visitors to our schools who are making a difference to society through their service and courageous advocacy, to inform and inspire us and to present positive role models with ethical and moral integrity for us to follow.

**“The best way to find yourself is to lose yourself in the service of others” Mahatma Gandhi**





At the ODBST we will encourage everyone to trust in their own capabilities and to recognise their potential. We want to challenge ourselves to be the best we can be – even when this becomes hard. We will do this by leading by example, supporting, and guiding one another, celebrating accomplishments, providing opportunities for all, developing confidence, resilience, and perseverance in both our children and our adults. We will encourage curiosity with a mindset of continuous improvement and personal growth. **We want our pupils to be able to say, 'I am special because... and I am learning to excel at....'**

"There is no gate, no lock, no bolt that you can set upon the freedom of my mind" Virginia Woolf



### 3. How ODBST operates

ODBST schools operate with a high level of accountability devolved to each Local Governing Body (LGB), which is supported by a “School to School” improvement model, facilitated by a core team of experienced professionals (i.e., ex-headteachers, lead inspectors) at the centre of the organisation, in partnership with the Oxford Diocesan Board of Education (ODBE). The Trust retains a service charge to cover the cost of its corporate work, providing support to schools across a range of services. This is illustrated by our ‘wall of support.’

We aspire for every pupil and adult to ‘experience life in all its fullness’ (John 10:10)



**ODBST**

*“Empowering our unique schools to excel”*



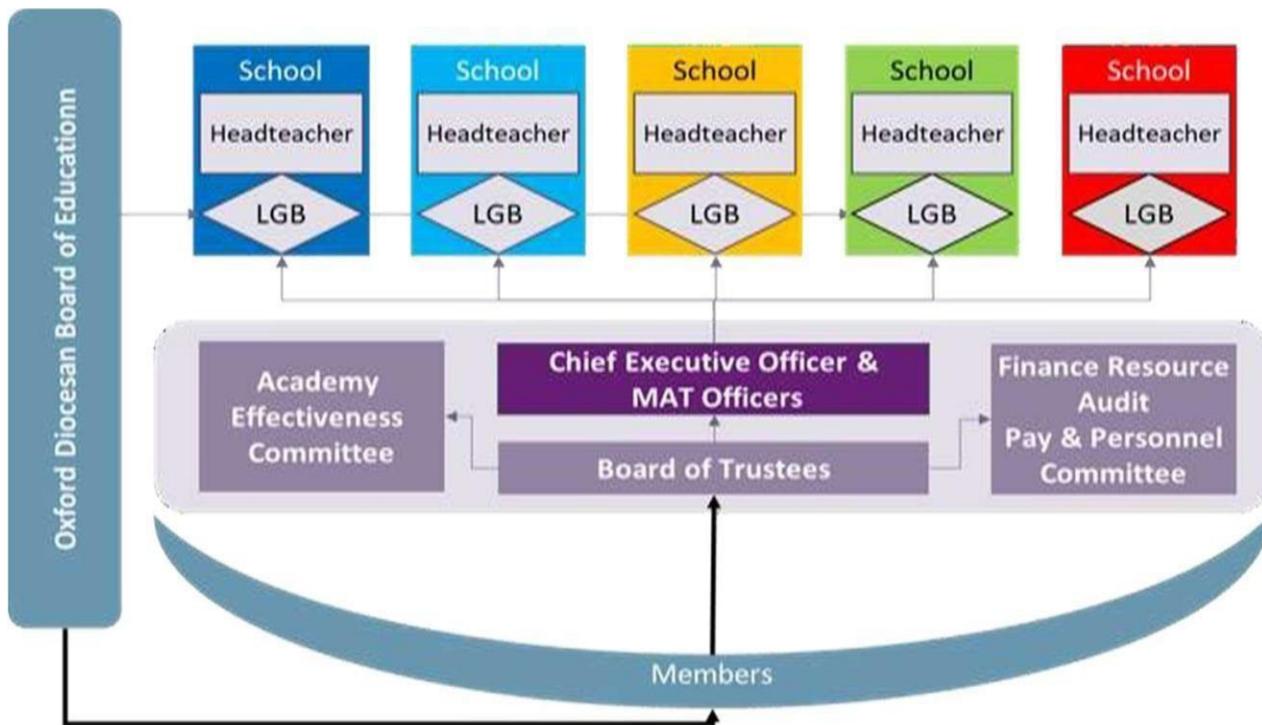
## ODBST Service Provision



The ODBST ensures it brings, develops, and makes use of the expertise of its staff to serve all its schools, the children and young people and the local communities. We are committed to drive improvement. We provide a wide range of services which ensure our schools and governors operate within an effective and strong framework which allows all our children to learn and flourish. Improving life chances by maintaining a high-quality offer of learning, development, and support for all is pivotal to our vision: ***‘Empowering our unique schools to excel’***.



**The ODBST Leadership model**



**Trustees**

- Michael Mill (Chair of the Board)
- Michael Phipps (Vice-Chair of the Board)
- The Rt Revd Dr Alan Wilson (Bishop of Buckingham)
- Denise Shepherd (Chair –Academy Improvement Committee)
- Revd Canon Rosie Harper
- Andrew Jeffrey (Chair - Finance, Resources, Pay & Personnel Committee)
- Kieran Soughton
- Tony Wilson (Diocesan Director of Education)
- Sulina Piesse (Chief Executive Officer)

**Officers**

- Sulina Piesse (Chief Executive Officer)
- Ruth Falkus (Chief Finance Officer)
- Rachael Hollinshead (Chief Operating Officer)
- Gillian Nickless (Director of HR)
- Deborah Stainer (Governance Professional)
- Jan Martin (Director of Education)
- Lorraine Quirk (Challenge Partner)
- Victoria Davies (Finance Officer)
- Rebecca Hussein-Allin (HR Officer)
- Emily Gatis (Marketing and Communications Administrator)
- Rob Halls (Challenge Partner)
- Ella Swinhoe (Operations Partner)
- Christine Smith (Finance Officer)
- Natalie Mitchell (HR Officer)

As a charity and company limited by guarantee, the ODBST is governed by a Board of Trustees who are responsible for and oversee the management and administration of the Company and the academies run by the Company. Governance arrangements comply with our articles of association. All our schools have their own Local Governing Bodies (LGBs) who serve our local communities. The communities which serve our Trust are diverse, which both enriches the Trust and makes it sensitive to local needs, pressures, and opportunities. Although Trustees delegate considerable responsibility to LGBs, there is oversight and scrutiny by them. The ODBST help support the LGBs to shape the needs of their communities. Our Trustees are accountable to external government agencies including the Department for Education (for the quality of the education they provide) and Ofsted (both at a school level for the quality of education and across the MAT as part of their Academy Trust Review cycle). Each school with their LGBs have systems in place through which they can assure themselves of the quality, safety, and good practice which the ODBST provides.

### **Local governing bodies (LGBs)**

There is a real focus on maintaining schools in their communities and for the ODBST to be responsive to parents and other communities' interests. Trustees are elected to establish LGBs to focus this individuality and contextual reflection. To achieve this, Trustees are clear about the levels and areas of delegation of Trustee responsibility to a local level through a Scheme of Delegation. Please see Appendix 1 – Summary of ODBST scheme of delegation. Our LGBs have a clear understanding of their roles and responsibilities and have the right skill set, (through a rigorous induction, ongoing training program) to ensure they drive a clarity of vision, ethos and strategic direction within the ODBST family; hold leaders to account for the educational performance of their school, its pupils, and staff; overseeing the financial performance of the school with its delegated budget, making sure its money is well spent and assuming delegated responsibility for ensuring that the school fulfils its statutory duties. Having a local governing body is an essential feature of the ODBST as these local governors understand their schools well-the staff, the parents, the children, and the community. LGBs play a pivotal part in canvassing the views of our academies' stakeholders, which we believe is essential to the success of all our schools.

### **Trustees**

ODBST Trustees are mainly appointed by Members. The Trustees set the strategic direction of the Trust, hold Senior Leaders to account and, as a business, oversee the Trust's financial performance. They are both company directors and charity Trustees for the ODBST. They retain overall responsibility for the operation of the ODBST and its academies and determine the level of delegation and the subsequent level of autonomy at the level where decisions can best impact on the quality of education and the experience pupils in the school.

### **Members**

The Members at ODBST are akin to the shareholders of a company. They have ultimate control over our Trust, with the ability to appoint the Trustees and the right to amend the Trust's articles of association.

#### **4. Academisation frequently asked questions and answers**

##### **a. What is an Academy?**

An academy is a government funded school that is independent to the Local Authority. Whilst academy status gives schools additional responsibilities and greater freedoms, in terms of the day to day functioning an academy will not be noticeably different for parents/the community compared to a Local Authority maintained school.

Responsibility for funding an academy, monitoring performance and any capital projects will fall to central government rather to local government, although in reality this will be via an Academy Trust.

If the decision is made to transfer to become an academy, the school and governing body will join an academy trust, which is a charitable company.

No one can make any money from the company. The company is limited by guarantee. It does not pay dividends and makes no profit.

##### **b. How much work is it to become an academy within an established Trust?**

The conversion process is managed by the ODBST team to enable the school to remain focused on the day to day running of their school. However, it helps if there is a standing Governing Body working group who can be involved in the statutory consultation. The school bursar and Headteacher will also need to be around in the run up to key dates identified by the DfE to ensure the various documents are signed and submitted in time.

##### **c. What does the conversion process involve?**

After you as a governing body have expressed an interest, and made the final decision to join the ODBST, you will need to register your request to join us, which will also need to be sent to the Diocese for approval. An application to the DfE for an Academy Order can be made at any stage of the process and does not commit you to becoming an academy within the ODBST, but usefully it releases Academy Support Grant funding that covers the costs of conversion (legal, new IT systems, and related set up costs) before works turn to detailed legal processes. You must complete a statutory consultation with interested parties before the funding agreement is signed, which is one of the final parts in the process.

##### **Key steps:**

1. The Governing Body formally agrees to consult on becoming an academy and within which MAT
2. Obtain the Secretary of State's initial consent by securing an "Academy Order"
3. Carry out the necessary consultation and decide to proceed
4. Agree a supplementary funding agreement with the DfE and the MAT
5. Ensure that the school site is made available to the MAT via leases and/or supplemental agreements
6. Ensure that financial systems are in place to manage funding
7. Transfer, renew or procure new contracts, service level agreements and licenses, and purchase insurance as appropriate
8. Transfer under TUPE all contract arrangements for staff. This is a formal legal consultation process which is separate from the consultation with all stakeholders. This would not start until after the vote by the Governing Body to apply for academy status

**d. How will the ODBST prioritise the order for conversion?**

The academy conversion journey will be individual to each school but will include a Due Diligence process which the ODBST carries out. The formal process can happen any time between applying for the Academy Order through to conversion. This process may identify issues which will require attention before conversion is complete. In conversation between the school, the Trust and the Local Authority, a convenient date for conversion will be developed and requested as part of the application process.

**e. How long does it take for a school to become an Academy?**

It is expected that most schools are able to convert to academy status in around five to eight months after achieving the initial DfE approval to proceed.

**f. Do schools need to consult before converting?**

Yes. All schools are required to carry out a consultation, but it is up to each school to decide whom and how to consult. There is no legally specified length of time for the consultation and schools have flexibility in how it is conducted. We are currently consulting with parents, staff, local schools, and the local community. We will also conduct information sessions for pupils.

**g. How should we engage interested parties?**

Whilst it is a legal requirement to carry out a consultation, there is no specification about how this should be carried out. An early consultation could take place at the point the governors are considering whether to become an academy asking opinions on whether to progress the idea, whereas later on in the process, the consultation would be more along the lines of whether there are objections to the proposal to become an academy with a specific MAT. A 4-week consultation period during term time with a public meeting is considered appropriate by the Diocese. ODBST will be present at the consultation meeting and will provide documents for the process. It should be noted that a public consultation is separate to the staff consultation which relates to TUPE.

## **5. School Improvement frequently asked questions and answers**

### **a. How many schools are in the Trust?**

Currently there are 12 schools in the ODBST.

### **b. Of these, how many are requires improvement category schools and how many are good or outstanding?**

Of the schools in the ODBST, 1 school is not yet good – all the rest are good schools.

The Downley joined the ODBST as a sponsored school as it was graded as an inadequate school. The school joined the ODBST on 1<sup>st</sup> September 2023.

### **c. What difference has the ODBST made to the schools within it?**

There are various measures and metrics that could be used, although their validity varies. If looking at Ofsted, our schools which have all been inspected over the last 18 months have all remained good schools with specific reference given to the contribution the ODBST team has made to their effectiveness.

Evidence suggests we have positive impact on the quality of education, assessment and tracking of pupils' outcomes; challenge and support cycles; governance, including LGB training, HR services, safeguarding support, well-being initiatives, and leadership development at all levels.

### **d. Is the ODBST's focus to maintain good and outstanding schools or to bring up failing schools?**

The ODBST is a trust open to all schools and we do not nor will the DfE allow us to cherry pick specific grades of schools. We have had a run of good schools join us, but this has given us the capacity to extend the offer of support and a possible home to schools causing concern such as with The Downley. This is important given our Christian foundation and, also serves to give our leaders and managers the opportunities of providing system leadership in other schools – which is a key driver for schools who wish to be rated as outstanding.

### **e. Who makes decisions regarding the Curriculum?**

The devolution of decisions and accountability is set out in our scheme of delegation. The curriculum is a delegated responsibility to Local Governing Bodies. The ODBST produces an overarching curriculum statement and provides guidance on areas where trustees need to remind LGBs of their statutory responsibility – i.e., sex and relationships education. In setting out these guidance/policy statements the directors do not seek to dictate the content of the curriculum or what is taught. Officers will monitor LGB decisions on the curriculum through their visits.

Academies are able to offer a more flexible curriculum, but they are required to provide a 'balanced and broadly based curriculum'. The teaching of English, Maths, and Science would, of course, remain central and as a church school RE would be important. The teachers and governors will work with the ODBST to implement the curriculum to best meet the needs of its pupils using the freedoms available to it.

**f. What would happen to SEN provision?**

We would continue to provide the same support for pupils with an ECHP and for those in receipt of SEND top up funding and indeed the funding for this element continues to be provided by the Local Authority. The Local Authority retains its responsibility for statutory duties, obligations and procedures remain in place when a school converts to academy status.

**g. How does the ODBST monitor standards and on what evidence are judgements made?**

We use the Ofsted handbook to judge pupil outcomes and Ofsted processes to ensure that this is backed up by the work and teaching seen in school. We use a central tracking system in our schools to ensure that our training and CPD for teachers, leaders and support staff has a common vocabulary and we support leaders and governors in their vital role of holding the school to account for the progress pupils make. The DfE uses end of key stage assessment outcomes to measure and hold to account Trustees for the outcomes of their schools and we would expect governors to similarly understand the information in Raise Online and understand how it may be reflected in judgements made on the overall effectiveness of the school. The ODBST will have ultimate accountability for the performance of each school, not the LGB, although robust monitoring and support will be expected from everyone involved.



## **6. Finance frequently asked questions and answers**

### **a. How is the funding calculated for schools?**

Funding for academies is currently matched to the Average Weighted Pupil Unit (AWPU) in the LA in which the school sits. So, the ODBST schools are funded in the same way as maintained schools with a slight top-up to cover the LA central services which the school would have to source independently. The Education Funding Agency passes the funding to the ODBST monthly and this is then credited to each school's bank account for governors to decide how to spend. The ODBST has a % service charge for the services it provides to its schools which is kept centrally. Premises funding is now devolved to the ODBST, and we have a process for allocating most of this to the highest priority condition issues with allowance for schools to bid for smaller or undertake specific projects. The service charge pays for all the services required by the school and it is rare to re-charge the school for any central purchases.

### **b. Can the ODBST change the funding formula for just one school in the Trust, or does the same formula apply to all schools?**

The same process for funding applies to all schools in the trust. Our master funding agreement with the DfE sets out how we are expected to manage funding, and this applies to all schools in the trust. Directors can remove delegation from a school if there is evidence that pupils' outcomes are not improving or that the LGB lacks the skills to manage their stewardship effectively – but this a similar power that the LA held.

### **c. Is there a risk the ODBST could reduce our funding?**

So long as the funding formula stays the same then schools should receive the same funding. We are, however, in a world where national funding formulae are suggested, and this could see our schools get either more or less according to how this is designed. There are currently no plans to have GAG pooling, where the Trust determines the level of funding to each school separately regardless of the funding formula.

### **d. Will there be a capital fund or a specific grant for insurance to cover for emergencies in academies?**

Academies are required to cover insurance at specified minimum levels of cover. The ODBST will ensure that the necessary insurance is in place through the Government's approved insurance scheme (RPA).

### **e. Who would own the land and buildings?**

The land and buildings remain in their current ownership but are made available to the academy via a 125- year lease and/or a supplemental agreement with the diocese.

### **f. Will we retain the existing financial systems?**

The Trust has one financial system and so it may be necessary for the school's system to migrate to

the MATs.

**g. How would we get a capital building project carried out?**

The ODBST is part of a pooled capital funding scheme coordinated through the Oxford Diocesan Board of Education (ODBE) and is awarded an annual allocation from the Department for Education. This is allocated to schools on the basis of our condition surveys. Our condition survey will be updated as part of the conversion process. Being part of the ODBST which has more than 5 schools and will have more than 3,000 pupils, additional capital projects which will serve all schools will be made possible.

**h. As a school, we were left money in trust. We are working on plans which would use much of that money, but what effect would joining ODBST have on our ability as a governing body to choose how that money is spent?**

Any money left in trust to a school, remains in trust and under the ownership of the trustees. Conversion would have no impact on how it is spent. ODBST would only seek to reassure itself that the company's good name or reputation was not compromised by the actions or decisions of trustees of any private fund.

**i. Would this have any impact on our funding from the ODBST?**

Not on the base funding – however if there were any decisions made by private fund trustees to, for example fund an employee, ODBST would expect any such payment to be made through the school's payment mechanisms and so vectored through the school's main bank account.

**j. Can you advise us of the tender process which ODBST undertakes for contractors/suppliers?**

In most cases this is a local decision – however for core processes (i.e., payroll) we undertook a classic tender process with board level decisions. In some cases, schools are beginning to want to explore joint/shared procurement and officers would use leadership briefings to explore these areas with our schools.

The core package of ODBE support is included within the ODBST service charge.

**k. What is ODBST policy on selling school assets...e.g., playing fields?**

Any assets are on lease to ODBST only, so we have no power to sell them.

## **7. Human Resources frequently asked questions and answers**

### **a. What happens to all of the staff?**

All staff are entitled to transfer, under TUPE regulations, to the Academy with their same terms and conditions as at present. ODBST continue to operate under nationally agree teachers pay and conditions and local authority schemes for non-teaching staff.

### **b. Can you advise on any changes to pensions and employment details for staff?**

Current employees undergo a TUPE process which protects their pay and conditions at the point of transfer – this applies to both teaching and non-teaching staff. The ODBST is a member of the TPA and LGPS and has chosen to maintain the Teachers pay and Conditions as set out in the latest STPCD. Non-teaching staff continue to be paid using Green Book and local salary scales (where applicable).

### **c. Can you advise on the training and support for our school admin/bursar with regard to monthly budgeting/finance system?**

All our bursars get extensive training, and the finance team provides half-termly meetings/briefings for finance managers to come together to discuss their work. We have finance team members who will work in schools where there are particular needs.

### **d. What support is there for schools with recruitment?**

Our HR team will support schools with day-to-day recruitment queries. In terms of selection processes, the ODBST would support any leadership recruitment but we tend to find that schools want to manage other roles internally.

## **8. Governance frequently asked questions and answers**

### **a. What are the expected changes to the Governing Body?**

The ODBST has a central board of Trustees, appointed by the Oxford Diocesan Board of Education, which is responsible to the Secretary of State for overall standards for each school in the ODBST and for maintaining a strategic oversight of the Trust. The school's Local Governing Body, which is a committee of the Trust, will also be established which will be responsible for the day-to-day operational matters, and accountable to the board of Trustees. This relationship is explained in detail with the Trust's extensive Scheme of delegation.

Recruiting and retaining governors with key skills and experience remains a key task for all schools and the ODBST are committed to supporting governors in their role.

### **b. What will happen to local links and partnerships that we already have?**

These will continue. By joining the ODBST it does not preclude schools from being part of local partnerships which are for the benefit of the school.

### **c. What will our governing body delegated powers and functions consist of?**

It would be called a Local Governing Body (LGB) and its delegated powers are set out in what is known as a scheme of delegation. Although the ODBST is accountable for the success of your school, we are committed to delegating powers back to local schools so that they maintain their individuality. The Scheme of Delegation is available for schools to consider in this pack.

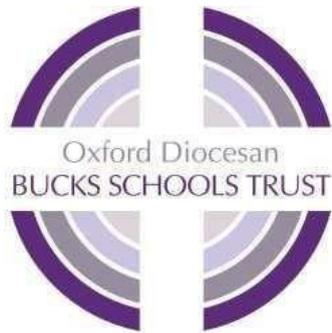
### **d. If we were to be part of the ODBST would the Trust have the final say in everything that Governor's decide?**

No, it doesn't necessarily work like that; the scheme of delegation captures the general principles and in many important aspects of school governance, everything stays the same but with different terminology. There will be some areas where the ODBST would be directly involved - e.g., in Headteacher recruitment- and there could conceivably be some scenarios, such as in finance or school improvement, where the ODBST would make a final decision on the basis that the underlying accountability for the school lies with the ODBST and the LGB has failed to demonstrate its effectiveness. Whilst such a scenario hasn't arisen to date, we would always seek to discuss matters firstly with the local governing body.

**e. What support is there for schools who are recruiting governors?**

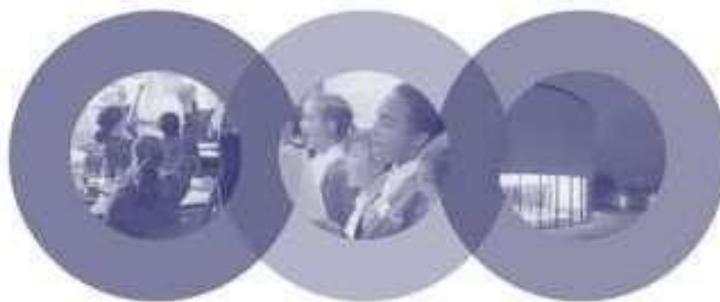
The usual sources/pools are explored and there is also support from the ODBST to recruit suitable governors.





# Governors' Briefing Pack

## Appendices



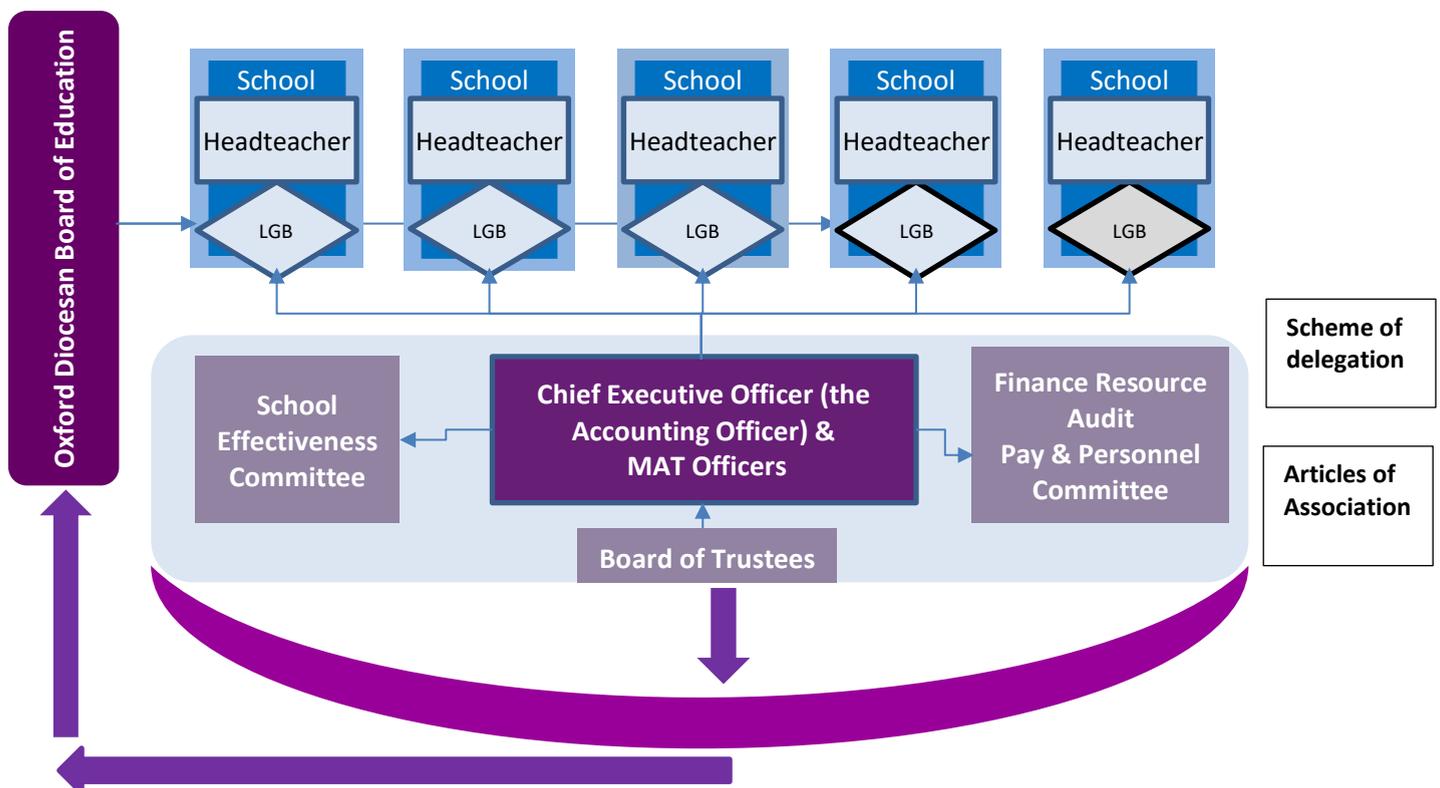
## Appendix 1 – ODBST scheme of delegation

### Introduction

The Oxford Diocesan Bucks Schools Trust (referred to as ODBST) is a charitable company limited by guarantee and single legal entity overseen by a single governing board (the ODBST Board of Trustees) which is ultimately accountable for all pupils, employees, schools, monies, assets and compliance with statutory duties. The Trust's purpose is defined by the company 'objects' in the Articles of Association which, in summary, is 'to provide education for public benefit'. A copy can be found here: [Oxford Diocesan Bucks Schools Trust - Key MAT information and Statutory Documents \(odbst.org.uk\)](http://oxforddiocesanbuckschoolstrust.org.uk)

The Trust is regulated by the Department for Education (DfE) which has delegated oversight responsibility for the performance of every academy trust in England to Regional Directors (RD) and the Education and Skills Funding Agency (ESFA). The Trust's Chief Executive Officer (CEO) and Chair of Trustees are invited to an annual Trust Review meeting with a representative of the RD. The Trust contracts with the ESFA to receive funding via Funding Agreements: [Oxford Diocesan Bucks Schools Trust - Finance \(odbst.org.uk\)](http://oxforddiocesanbuckschoolstrust.org.uk). The Funding Agreements stipulate several regulatory requirements including compliance with the Academies Trust Handbook.

### Governance Structure



Key: purple = Trust wide remit; blue = school remit.

The governance structure diagram could be viewed as hierarchical but the Trust Board would prefer to view itself as sitting behind the Local Governing Bodies (LGBs). Trustees have chosen to appoint Local Governing Bodies (LGBs) as part of its structure of committees, as these are at the frontline of detailed information about how their schools are performing. It has chosen to opt for parental representation of the Trust at this local level, from within the community the school serves. As a result, the Trust Board recognises and appreciates the strategic leadership input of local governors who oversee delivery of the Trust's vision and strategic plan priorities to make a positive impact on children, their families, and local communities.

## Members

The role of Members is to act as the guardians of the Trust's constitution (Articles of Association). Every academy trust has Members who have a similar role to shareholders of a company (but to clarify, there are no shares in an academy trust) and the Oxford Diocesan Board of Education (ODBE) is a Corporate Member of the Trust. In addition to attending the Annual General Meeting, Members are made aware of any key factors affecting the Trust and its educational and financial performance. Members:

1. Are the subscribers to the memorandum of association (if they signed the legal documents to open the Trust).
2. May amend the Articles of Association subject to any restrictions created by the funding agreement or charity law.
3. May, by special resolution, appoint new Members or remove existing Members other than, where there is one, the foundation/sponsor body and any Members it has appointed.
4. Have powers to appoint/remove Trustees as set out in the Trust's Articles of Association and powers under the Companies Act 2006.
5. May, by special resolution, issue direction to the Trustees to take a specific action.
6. Appoint the Trust's external auditors and receive (but do not sign) the audited annual report and accounts (subject to the Companies Act).
7. Have power to change the company's name and, ultimately, wind it up.

Board of Trustees (can also be referred to as Directors as MATs are also companies). The Trustees are both charity trustees and company directors and must comply with the Trust's charitable objects, with company and charity law and with their contractual obligations under their funding agreement with the Secretary of State. The Members appoint the majority of Trustees. The Diocesan Director of Education and the Chief Executive Officer (CEO) are ex-officio Trustees. The Trust Board may appoint co-opted Trustees for their skills, knowledge and experience. Trustees shall, for each school year, elect a chair and vice-chair from among their number.

The Trust Board is ultimately accountable to the DfE for the quality and effectiveness of its educational and financial performance, governance and ensuring compliance with statutory duties and regulatory requirements. The Trust Board has appointed the Head of Governance as the Company Secretary and has access to its own legal and other specialist advisors. The Trust Board is collectively responsible for fulfilling three core functions:

1. Ensuring clarity of vision, ethos, and strategic direction.
2. Holding executive leaders to account for the educational performance of the organisation and its pupils, and the performance management of staff.
3. Overseeing and ensuring effective financial performance.

For transparency, the names of the Trust's Members and Trustees are published on the ODBST website:  
Oxford Diocesan Bucks Schools Trust - Members and Trustees ([odbst.org.uk](http://odbst.org.uk))

## Committees

The Scheme of Delegation is a key governance document because without it, it is not clear how accountability and decision-making works within the trust. This is why the Academy Trust Handbook requires it to be published on the Trust's website.

It is especially important that maintained schools joining academy trusts take time to understand the Scheme of Delegation so that they are clear about the ODBST's approach to local governance and which functions are delegated.

The Trust Board's Scheme of Delegation (SoD) is reviewed annually and sets out what the Board has opted to delegate to its committees and executive/senior leaders. This is on the understanding that they will carry out their delegated duties strictly in line with committee terms of reference (Appendices B-D) and the Scheme of Delegation Matrix (Appendix A) and to maximise effectiveness, efficiency and impact from the Trust's governance arrangements. The Trust Board has absolute discretion to alter or withdraw any provisions of the Scheme of Delegation for individual schools and any delegated duties exercised must be reported back to the Trust Board via the committee meeting minutes and annual reports. Effective relationships and two-way communication to/from the Trust Board and its committees are also facilitated through termly Chairs' forum meetings as well as ODBST Governance Collaborative Professional Development events and webinars.

All policies referred to in this scheme of delegation relate to the current policies stored in the ODBST Policies SharePoint and/or published on the website Oxford Diocesan Bucks Schools Trust - Policies ([odbst.org.uk](http://odbst.org.uk))

The Trust Board takes out indemnity insurance annually to protect those working in it, or on behalf of it, from civil or criminal proceedings where they are acquitted by the court from liability for negligence, default, breach of duty or breach of trust in relation to the affairs of the Trust. This includes the Trust Board and all Trust Committees, including LGBs.

In addition to having Local Governing Bodies for each school, the Trust Board has two Trustee committees- Finance, Revenue, Audit, Pay and Personnel (FRAPP), which undertakes the legal responsibilities of audit, and the School Effectiveness Committee (SEC). The Terms of Reference for FRAPP and SEC are found at Appendices C and D.

As with all committees, the Trust Board has the power to change the constitution and powers of its committees at any time, and this includes the membership of those committees too.

Key Principles of Delegation (Sept 2022).

# Matrix of Delegated Authorities

## Glossary to Table of Responsibilities

ODBST has adopted the following matrix.

**MEMBERS:** Under normal on-going Trust activities the Members do not get involved with the day-to-day operations of the Trust Board or the leadership activities of the CEO. Members keep a watching brief through access to minutes and meetings with the Trust Board Chair and the CEO when required. Members hold the Trust Board to account for the effective governance of the Trust, but they have a minimal impact on the running of the Trust. Members are essential to the integrity of an academy trust structure. They are the last line of defense from the failure of governance and failure to uphold the charitable objects of the organisation. The Members comprise the Bishop of Oxford, the Diocesan Board of Education, acting corporately by hand of its Director, and two further Members appointed with the consent of the Diocesan Board of Education.

<b>Perform</b>	The individual/group will follow agreed policies and procedures or carry out specified duties. They are accountable for executing or implementing decisions or policies. They may be required to report on the delivery of duties/actions. In the case of (i) the CEO, reports will be to the Board, (ii) the LGC, they will be making reports in relation to their school to the Board and/or CEO (as appropriate) and (iii) the Head, they will be making reports in relation to their school to the CEO and/or LGB (as appropriate).
<b>Consult</b>	The individual/group that should be consulted as part of the process of completing a particular task. This role describes those whose knowledge and expertise is important in making the decision but does not imply that their input will be followed in all circumstances. This role is a supporting role
<b>Recommend</b>	The individual/group should make recommendations as to how a particular task should be completed or what particular course of action should be taken. The Recommend role typically involves a significant element of work in a decision. They may gather relevant input (Consult) and propose a course of action—sometimes alternative courses, complete with pros and cons so that the Approver's choices are clear, simple and timely.
<b>Agree</b>	This role represents a <b>formal approval</b> of a recommendation. The 'Agree' and the 'Recommend' should work together to come to a mutually satisfactory proposal to bring forward to the Approve group. Not all decisions need an Agree role, as this is typically reserved for those situations where some form of regulatory or compliance sign-off is required.
<b>Approve</b>	Approves the decision or activity. Accountable for making sure the activity is satisfactory and meets performance standards. May delegate work. <b>There must be only one Approve body specified for each task.</b>
<b>Monitor</b>	The individual/group which observes, checks and ensures the delivery of a particular task. They may be required to report to other groups.
<b>Scrutiny</b>	The individual/groups will undertake a careful and detailed examination of a particular task to ensure compliance.
<b>TB</b>	Trust Board
<b>LGB</b>	Local Governing Body
<b>CEO</b>	Chief Executive Officer (or members of the shared services team –SST- to which the function is delegated)
<b>ODBE</b>	Oxford Diocesan Board of Education

## Table of Responsibilities

A. STRUCTURE & APPOINTMENTS						
	Appointed Position	HT	LGB	CEO	TB	MEMBER
1.	Role descriptions for Trustees			Recommend	Approve	Monitor
2.	Trust Committees- FRAPP and SEC- (structure, role descriptions, terms of reference and membership)			Recommend	Approve	Monitor
3.	Trust Committees- LGBs (structure, role descriptions and terms of reference)			Recommend	Approve	Monitor
4.	Trustees (Appoint /Remove)				Recommend	Approve
5.	Trust Board Chair (Appoint/ Remove)				Approve	Monitor
6.	Trust Board Chair 360° review			Consult	Consult Approve	Monitor
7.	Co-opted Trustees (Appoint/ Remove) with ODBE consent			Recommend	Approve	Monitor
8.	Trust Board Vice Chair (Appoint /Remove)				Approve	Monitor
9.	Appointment /removal of LGB Chair	Consult	Recommend	Recommend	Approve	
10.	Appointment /removal of LGB Vice Chair	Consult	Approve	Monitor	Monitor	
11.	Appointment /removal of Foundation and Skills LGB governors	Consult	Recommend	Recommend	Approve	
12.	Election /removal of Parent and Staff governors	Recommend	Approve	Monitor	Scrutiny	
13.	Appoint elected Parent and Staff governors (following local election)			Recommend	Approve	
14.	CEO (Appoint/ Remove)				Approve	

15.	Accounting Officer (Appoint/ Remove)				Approve	
16.	Chief Finance Officer (Appoint/ Remove)			Recommend	Approve	
17.	Governance Professional (Appoint/ Remove)			Recommend	Approve	
18.	Headteacher (Appoint/ Remove)		Recommend	Approve	Scrutiny	
19.	Appoint other members of the Shared Services Team			Approve		
20.	Other senior school staff including Deputy and Assistant Heads and School Business Managers plus other interim senior leaders	Recommend	Approve	Consult		
21.	Remove local governance professional to the LGB	Recommend	Approve	Consult	Monitor	
22.	Appoint other school teachers, teaching assistants and support staff	Approve	Consult			
23.	Dismissal of other staff (not HT)	Recommend	Approve	Consult		
24.	Determining early retirement or requests for flexible working	Recommend	Approve	Consult		

## B. STRATEGIC OBJECTIVES

	Duty	HT	LGB	CEO	TB	MEMBER
1.	Determine the Trust's culture, Christian values and ethos	Consult	Consult	Recommend	Approve	Consult
2.	Determine and deliver the Trust's strategic objectives, vision, Strategy and Key Performance Indicators	Consult	Consult	Recommend Perform	Approve Scrutiny	Monitor
3.	Determine and deliver each school's strategic objectives, vision and strategy in line with the Trust's vision, ethos and values	Recommend	Approve	Consult Monitor	Scrutiny	Monitor
4.	Effectiveness and scope of shared services provided to the schools by the Trust	Consult	Consult	Perform	Monitor	
5.	Determine Trust policies in line with the Trust's ethos and values as a single entity	Perform	Perform	Recommend	Scrutiny Approve	Monitor
6.	Determine local school policies and internal procedures in line with the school's ethos and values	Perform	Approve	Scrutiny	Monitor	

## C. COMPLIANCE

	Duty	HEAD	LGB	CEO	TB	Members
1.	Agree Articles of Association			Consult	Consult Recommend	Approve
2.	<b>Appoint</b> the Trust's financial auditors on an annual basis			Consult	Recommend	Approve
3.	Trust annual report			Perform	Approve Monitor	Scrutiny
4.	Annual cycle of business for Trust Board			Recommend	Approve	
5.	Annual cycle of business for Local Governing Bodies		Consult	Recommend	Approve	
6.	Use of LGB half termly agenda template as provided	Perform	Perform	Recommend	Scrutiny	
7.	Provision of LGB draft minutes to Trustees within 14 days	Perform	Perform	Monitor	Scrutiny	
8.	<b>Scheme of delegation:</b> Vary individual school schemes of delegation where additional support is required-see detail of special provisions on p24	Consult	Consult	Recommend	Approve	
9.	Remove/ amend make-up of LGB	Consult	Consult	Recommend	Approve	
10.	<b>Funding Agreement</b> – comply with all obligations including the Academy Trust Handbook	Perform	Perform	Perform	Monitor Perform	Scrutiny
11.	<b>Regulatory</b> comply with all regulations affecting the Trust (including all charity law, company law, employment law and health and safety)	Perform	Perform	Perform Monitor	Perform Monitor	Scrutiny
12.	<b>Financial controls</b> – implementation of appropriate financial controls and policies so that there is regularity, probity and value for money in relation to the	Perform	Perform	Perform Monitor	Approve Monitor	Scrutiny

	management of public funds					
13.	Register of business interests, conflicts of interest and connected/ related party transactions	Perform	Perform	Perform Monitor	Perform Monitor	Perform Scrutiny
14.	Growth of the Trust - consider requests from other schools to join the Trust			Recommend	Scrutiny Approve	Scrutiny
15.	Compliance with statutory requirements, such as H&S, Fire Management, Safeguarding and Information, Governance and Data Protection	Perform	Perform	Perform Monitor	Perform Scrutiny	Scrutiny
16.	Develop and ensure oversight of all ODBST buildings and property matters (liaison with ODBE where appropriate)	Perform	Perform	Monitor	Scrutiny	
17.	Appoint a Trust Senior Leader as Designated Safeguarding Lead to ensure compliance with child protection legislation via implementation of the Trust's Child Protection legislation			Recommend Perform	Approve	
18.	Appoint a safeguarding lead Trustee				Recommend Approve	
19.	Appoint a SEND lead Trustee				Recommend Approve	
20.	Appoint a SEND local governor to ensure to ensure impact is evident in pupil outcomes from the implementation of the SEND		Approve Perform	Scrutiny	Monitor	

	code of practice /policy/ EHC plans					
21.	Appoint a safeguarding local governor		Approve Perform	Scrutiny	Monitor	
22.	Appoint a H&S local governor to ensure compliance with Trust H&S policies and practices, and appropriate risk assessments are carried out by leaders and external advisers		Approve Perform	Scrutiny	Monitor	
23.	Approve Admissions policy and/or arrangements (e.g PAN, age) in line with School Admissions and Appeals Code		Consult	Recommend	Approve Monitor	
24.	Ensure compliance with GDPR and Trust's data protection policy and procedures	Perform	Perform	Perform Monitor	Scrutiny Perform	
25.	Policies (statutory Trust-wide policies)	Perform	Perform	Recommend	Approve	
26.	Policies- specific school policies	Perform	Approve	Monitor	Scrutiny	
27.	Publish annual strategy and impact reports for grant funding e.g pupil premium and sports premium	Perform	Approve	Monitor	Scrutiny	
28.	Convene local governors for any panels required i.e pay, exclusions, disciplinary, capability, complaints, appeals	Recommend	Approve	Monitor		
29.	Self-evaluate Trust Board performance and impact annually			Recommend	Perform	Scrutiny

30.	Self-evaluate Local Governing Committees' performance and impact annually and report the outcome to the Trust's Full Board Meeting	Consult	Perform	Monitor	Scrutiny	
31.	Evaluate the CEO performance and impact annually		Consult	Perform Recommend	Perform Approve	
32.	Evaluate the Shared Services Team performance and impact annually		Consult	Perform Approve	Monitor	
33.	Ensure website compliance	Perform	Perform monitor	Perform monitor	Scrutiny	Scrutiny
34.	Maintain accurate and effective and secure employee files- school level	Perform	Monitor	Scrutiny	Scrutiny	
35.	Maintain accurate and effective and secure employee files- Shared Services Team			Perform	Scrutiny	
36.	Maintain an accurate and effective and secure Single Central Record (SCR)- school level	Perform	Monitor	Scrutiny	Scrutiny	
37.	Maintain an accurate and effective and secure Single CentralRecord (SCR)- Shared Services Team			Perform	Scrutiny	
38.	Undertake pre-appointment checks for staff & governance stakeholders inc. DBS – school level	Perform	Monitor	Monitor Scrutiny	Scrutiny	
39.	Undertake pre-appointment checks for staff & governance stakeholders inc. DBS- Shared Services Team			Perform	Scrutiny	
40.	Trust Risk Register			Perform Monitor	Scrutiny	Scrutiny

41.	School Risk Register	Perform	Monitor	Monitor	Scrutiny	
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## D. SCHOOL IMPROVEMENT

		HT	LGB	CEO	TB	Members
1.	School Development Plan Priorities	Recommend Perform	Approve Monitor	Approve Monitor	Scrutiny	
2.	All schools are compliant with statutory arrangements endorsed by the Trust	Perform	Perform Monitor	Monitor	Scrutiny	
3.	Deliver support to Looked After Children and Previously Looked After Children	Perform	Monitor	Monitor	Scrutiny	
4.	To implement SEND policy	Perform	Monitor	Perform Monitor	Scrutiny	
5.	To ensure the public sector equality policy objectives are met	Perform	Monitor	Perform Monitor	Scrutiny	
6.	Maintain accurate, effective and secure pupil records	Perform	Monitor	Perform Monitor	Scrutiny	
7.	C of E schools only: ensure the Christian ethos and distinctiveness is evident in the school's published curriculum statement and provides strong links and partnership with the church at parish and diocesan levels	Perform	Perform Monitor	Scrutiny	Scrutiny	Scrutiny
8.	Curriculum intent, implementation and impact	Perform	Monitor	Approve Monitor	Scrutiny	
9.	Early Years curriculum in line with Early Years Foundation Stage (EYFS) framework	Perform	Monitor	Approve Monitor	Scrutiny	
10.	Ofsted: ensure schools are inspection ready.	Perform	Monitor	Monitor Perform	Scrutiny	
11.	SIAMs: ensure schools are inspection ready.	Perform	Monitor	Scrutiny	Scrutiny	
12.	Setting/agreement of pupil targets and outcomes	Perform	Monitor	Approve Monitor	Scrutiny	
13.	Provide accurate / reliable assessment data of pupils'	Perform	Monitor	Monitor	Scrutiny	

	progress and predicted attainment					
14.	Implementation and impact of School-level CPD programme	Perform	Monitor	Recommend Monitor	Monitor	
15.	CPD for Trustees			Recommend Perform Monitor	Perform Monitor	
16.	CPD for LGB Governors	Consult Perform	Recommend Perform	Monitor	Monitor	
17.	Report on delivery and impact of ring-fenced funding ( <i>Pupil Premium, Sports Premium (Primary), Year 7 Catch up, Covid Catch up, SEND</i> )	Perform	Monitor	Monitor	Scrutiny	
18.	Statutory changes to school organisation	Consult	Consult	Recommend	Approve	
19.	Collective Worship delivery in line with statutory requirements	Perform	Monitor	Monitor	Scrutiny	
20.	Relationships Education in line with statutory requirements	Perform	Monitor	Monitor	Scrutiny	
21.	Maintaining admission and attendance register in line with statutory requirements	Perform	Monitor	Monitor	Scrutiny	
22.	Implement behaviour policy	Perform	Monitor	Monitor	Scrutiny	
23.	Fixed Suspensions	Approve	Monitor	Monitor	Scrutiny	
24.	Permanent Exclusions	Recommend to CEO	Monitor	Approve prior to permanent exclusion	Monitor	
25.	School Operational Hours / Termdates	Consult	Recommend	Approve	Scrutiny	
26.	Ensure school lunches are provided to appropriate nutritional standards to all children, including those eligible for free school meals	Perform	Monitor	Monitor	Scrutiny	

## Overview of Strategic Financial Management

As a family of schools, our financial strategy seeks to make the best use of the resources at our disposal using the following core principles:

- **Consistent entitlement** – every child should have a consistent entitlement to financial resource in line with their own unique needs regardless of which school they attend.
- **Efficiency** – Headteachers and the shared services team must demonstrably manage the resources under their control as efficiently as possible.
- **Integration and Collaboration** – our aim is to ensure as much resource as possible is directed to the needs of the individual pupil. Whilst this involves focusing on efficiency it also means working together, and to support and share resources as best possible.
- **Sustainability** – the ongoing health of the organisation is based on operating within our income levels over the business cycle. Leadership at all levels, national, regional and within every school must demonstrably committed to this end.
- 

To support this strategy:

We monitor key KPIs such as Pupil Teacher Ratios (PTR), Pupil Adult Ratios (PAR), average levels of pay and pupil numbers v School capacity.

Headteachers remain accountable for school specific budgets and manage the bulk of our income in delivering front line education.

Local Governing Committees are responsible for monitoring the effective impact of ring-fenced funding including Pupil Premium, SEND and Sports Premium and Catch-up Funding.

Both groups are charged with ensuring they deliver value for money through adopting efficient structures, collaborating, and continually challenging themselves to improve the impact and cost of the work they do for our children.

## Budget Setting

We are required by the ESFA to submit an overall balanced budget. Every year a finance timetable is constructed detailing the phases of budget (and three-year plan) preparation including:

- An initial draft looks at next year's budget in October/November designed to flush out any future strategic challenges
- This is followed by a detailed update in April/May once we have had formal confirmation of income from the ESFA. These budgets are internally signed off by the CFO and the Accounting Officer prior to gaining Board approval. This budget is consolidated in May in order for us to meet the ESFA's submission deadline of the end of July.

## E. FINANCE

	Duty	HEAD	LGB	CEO	TB	Members
1.	Set Trust budget			Recommend	Approve	Scrutiny
2.	Set individual school budget	Recommend Perform	Recommend Perform	Monitor	Approve	
3.	Managing school budget according to the Trust Financial Manual	Perform	Perform Monitor	Recommend Monitor	Scrutiny	
4.	Determination of central recharge	Consult	Consult	Recommend	Approve	
5.	School delegated capital spending eg DFC	Perform	Approve Monitor	Monitor	Scrutiny	
6.	External capital grant funding eg TCaF	Consult	Consult	Recommend	Approve Monitor	
7.	School Management accounts	Perform	Monitor	Monitor	Scrutiny	
8.	Trust Management Accounts			Perform Monitor	Approve Monitor	Scrutiny
9.	Trust insurance arrangements	Consult	Consult	Recommend	Approve	
10	Trust Investments Policy including internal controls			Recommend	Approve	
11	Trust Buildings, Asset and Premises Maintenance Strategy- school level provision of annual maintenance plan	Perform Consult		Recommend Approve Monitor	Approve Monitor	
12	Trust Buildings, Asset and Premises Maintenance Strategy- Trust level			Recommend	Approve	
13	Acquiring and disposing of Trust Freehold owned land	Consult	Consult	Recommend	Approve	

## F. PAY AND PERFORMANCE

Duty		HEAD	LGB	CEO	TB	Members
1.	Determine CEO pay level, appraisal and payaward				Recommend Approve	
2.	Set Terms and Conditions of Employment and salary scales			Recommend	Approve	
3.	Determine Headteacher performance management and pay awards in accordance with Trust Pay Policy		Recommend	Approve	Scrutiny	
4.	Determine performance management and pay awards in accordance with Trust Pay Policy within agreed budget– school staff, except Headteacher	Recommend	Approve	Scrutiny		
5.	School staffing structure within the agreed budget	Recommend	Approve	Consult Monitor	Scrutiny	
6.	School staffing structure changes outside of budget	Recommend	Recommend	Approve	Scrutiny	
7.	Implementation of Trust HR policies- schools	Perform	Perform	Monitor	Scrutiny	
8.	Implementation of Trust HR policies- shared services team			Perform Monitor	Scrutiny	
9.	Hear Grievance, Disciplinary, Redundancy, Capability cases	Perform	Perform	Approve	Monitor (only in respect of an appeal panel if required)	
10.	Hear Grievance, Disciplinary, Redundancy, Capability cases- shared services team			Approve	Scrutiny	

### Terms of Reference for Local Governing Bodies (LGBs)

Local Governing Bodies are legally committees of the Trust Board and operate on the basis of the delegated powers given to them by Trustees, as expressed in this document. The Articles of Association do not require Trustees to form local committees, but in doing so, Trustees have committed to the separation of each tier in the governance structure to demonstrate transparent decision making and prevent bias and conflicts from emerging, therefore strengthening the checks and balances within the Trust. In delegating to LGBs, these committees are a valued point of consultation and representation in the development of Trust policies and are recipients of detailed information about how the school is being managed, therefore providing Trustees with assurances that the school is operating within the ethos and values of the Trust, meeting agreed targets and engaging with all stakeholders, reflecting the diversity of its local community.

As a committee of the Trust Board, Trustees appoint LGB Skills governors and make a recommendation to ODBE for the appointment of Foundation governors. Parent and staff representatives, whilst elected at school level, will have those appointments confirmed by Trustees in a welcome letter.

#### Overall responsibilities of the Local Governing Bodies (LGBs)

To ensure the Board maintains effective oversight of **educational performance** and **local financial management** for the benefit of children, the Trust Board has delegated responsibility to LGBs:

- for driving educational improvement via the **monitoring and evaluation** of educational performance against the School Development Plan,
- the provision of challenge as well as support to **hold school leaders to account** for school standards, pupil outcomes (especially for disadvantaged children), spirituality and wellbeing, stakeholder engagement and regulatory compliance i.e. safeguarding, H&S, SEND.
- to acceptably **manage and expend** all monies received on account from the Trust.

#### Membership

A minimum of 9 and up to 12 governors as agreed with the Trust, recruited for their skills, knowledge and experience in the following categories:

Membership	Number- formerly VA*	Number- formerly VC**	Number- formerly community	Term	Election Process
Foundation	5-8	2-3	0	4 years	There are no ex-officio arrangements for Foundation governors. Applications should be made in consultation with the local PCC/incumbent and with the Chair of Governors (who will endorse the application before submission). Trustees will make a recommendation to ODBE for appointment. Foundation Governors are appointed with the additional responsibility to support and promote the Christian foundations of the school.
Skills	0	3-4	5-8	4 years	Skills governors are appointed by Trustees. Applications should be endorsed by the LGB Chair and should take place on the ODBST Skills Governor application form.
Headteacher	1	1	1		Ex-officio
Staff	1	1	1	4 years	No change in the current procedure: elected by staff, following which the candidate will fill out the

					ODBST Staff application form. The Head of Governance will confirm the appointment in a letter of welcome, on behalf of Trustees, with the term of office beginning on the date of the election.
Parent	2	2-3	2	4 years	No change in the current procedure: elected by parents, following which the candidate will fill out the ODBST Parent application form. The Head of Governance will confirm the appointment in a letter of welcome, on behalf of Trustees, with the term of office beginning on the date of the election. In the case where the number of parents standing for election is less than the number of parent governor vacancies, Trustees may <i>appoint</i> a Parent Governor, following the same procedure for the appointment of Skills governors.

\*former VA schools to have 75% Foundation Governors

\*\*former VC schools to have 25% Foundation Governors

The Trust Board appoints the Local Governing Body Chair, or Co-Chairs: appointment will run concurrent with the governor's term of office. LGBs should advise the Head of Governance of their nominated candidate for Chair, and this will be put to Trustees for appointment, and confirmed in writing. Subject to remaining eligible to be a governor, they may be re-appointed as Chair. The LGB appoints its own Vice-Chair annually.

All LGB members on appointment are required to give a written undertaking to the Trustees, Site Trustees (where appropriate) and ODBE to uphold the Object of the Company (see Articles, paragraph 4): the governor application form includes this declaration.

Where a vacancy occurs in any governor category, Trustees must be informed of this immediately by either the LGB Chair or local governance professional. All governors are required to uphold the LGB Code of Conduct, Articles of Association and provisions of this scheme of delegation and stand by decisions made as a collective.

Additional Trust-appointed governors (though not including employees of the Trust) who have the necessary skill set will be considered in exceptional circumstances where the Trust decides that the LGB requires additional capacity. These governors will be known as Co-opted Governors and will be appointed by Trustees for a period up to four years. The procedure for co-opting an additional governor will be via discussion with the LGB Chair and submission of the Co-opted Governor application form. Trustees will make the decision to appoint such governors following this process. The appointment will be confirmed in writing. (Please note that LGBs have permission to bring additional members beyond the LGB onto the Resources Committee, without having to formally co-opt- see below).

### Special Provisions

Trustees wish to leave day-to-day local governance to LGBs when they are operating effectively. However, where local governance requires support and improvement, Trustees may decide to take responsibility from LGBs for certain items within the Matrix of Delegation, and may vary the matters delegated where, for example:

- The LGB acts outside its delegated powers and limitations.
- The LGB is in breach of these terms of reference.

- The LGB is unable to fulfil its role and responsibility as defined in the scheme of delegation.

In these circumstances, LGBs will be provided with a varied scheme of delegation, setting out those areas for which the Trust has taken control and will provide support.

In the event of serious weakness and ineffective local governance, Trustees may decide to disband the LGB and replace it with a Trust Board appointed Interim Education Committee (IEC). Examples of circumstances where this may occur may be:

- The school has a financial reserves deficit in excess of £50k.
- Standards are below floor standards/ consistently low and lack evidence to show improvement.
- Governors do not demonstrate the skills and attributes to perform their collective role effectively.
- The curriculum fails to provide for a broad and balanced education.
- A serious failure in safeguarding or Health and Safety compliance has occurred.

These lists are illustrative only and shall not limit the rights of Trustees to suspend or remove any or all of the matters delegated where there are concerns.

### Reporting

- The Headteacher is responsible for reporting all operational matters to the LGB.
- The local governance professional is to ensure minutes are shared with the Head of Governance within 14 days of the LGB meeting (with the Chair and Headteacher having first agreed the draft).
- LGB governors are to be invited to termly/ half termly (depends on school categorization) school improvement visits (Note of Visit meetings) led by the Director of Education, or their representative.
- The Chair is to promote a two-way flow of communication between the Trust Board and LGB by attending the Chairs' Forum meetings three times a year (or nominating the Vice-Chair to attend in their place) and by sharing information produced for LGBs by the Trust, such as through regular two weekly Leadership Updates etc.

### Quorum and Meeting Frequency

LGBs shall meet formally for full LGB meetings six times per year. A minimum of three governors including either the Committee Chair or Vice-Chair, is required to be quorate.

The LGB may decide to establish a separate **Resources committee**, meeting a minimum of three times per year. Where this is a separate sub-committee, membership may include those who do not also serve on the LGB, provided that a majority of the members of this sub-committee are appointed members of the LGB (in accordance with the membership table above) or Trustees. The terms of reference for the Resources Committee are detailed below. It is for the LGB to determine who shall be entitled to vote in the proceedings of the sub-committee. Decisions of the committee shall be taken by a majority vote of committee members, with the Resources Committee Chair having a casting vote.

There is no expectation that LGBs have further sub-committees beyond Resources. However, if they wish to do so, this is a local decision. They may, however, have to establish/convene other panels periodically when required i.e. pay, exclusions, disciplinary, capability, complaints, appeals. Decisions of the committee shall be taken by a majority vote of governors, with the Chair having a casting vote.

### Terms of Reference – LGB meetings

#### **Approve the school's vision and ethos (aligned with the Trust's vision, ethos, and values).**

1. Monitor/evaluate the school's educational performance against the SDP KPIs and ODBST Risk Register,

challenging the Headteacher in relation to the impact of interventions and support and agreeing follow-up action or celebrating achievements.

2. Monitor and evaluate how deeply the Christian ethos (formerly VA/VC schools), vision and values are embedded in the school, including in the published curriculum statement of intent, implementation, and impact.
3. Note and adopt designated Trust policies.
4. Approve local level school policies and internal procedures in line with the school's ethos and values.
5. Monitor and evaluate the impact of the school's Stakeholder Engagement Plan, ensuring it is aligned to the Trust's key messages and promotes the voice of parents, staff and pupils.
6. Appoint a *designated* governor for Safeguarding and SEND, and a *link* governor for Disadvantaged/Vulnerable Pupils (including Pupil Premium), GDPR, Health and Safety, Early Years, Maths and English. It is for LGBs to determine how they wish to group these specified designated and link roles, and whether to combine them with other monitoring roles of their choice.
7. Part of the governor monitoring role will be to undertake regular pre-arranged and accompanied visits to triangulate data and evidence. Governors are also invited to attend termly/half termly Note of Visit meetings by the Director of Education or their representative, SIAMS and Ofsted inspection meetings, in order to identify school areas of strength and improvement and opportunities to share best practice.
8. Contribute to the appointment of school leaders/teachers, and performance management of the Headteacher.
9. Ensure school compliance with statutory duties and ensuring that the governance areas of the school website and GIAS are fully up to date and compliant, in accordance with DfE/ Academy Trust Handbook requirements. Compliance guidance is provided within the Internal Finance Procedures Manual.
10. Self-evaluate LGB performance and impact on pupils' outcomes and spiritual development annually.

### **Terms of Reference – Resources Committee**

#### **General provisions**

11. A minimum of three meetings per academic year is required for the Resources Committee, if LGBs choose to have this separate committee.
12. These committee meetings will not be open to the public, but minutes shall be made available.
13. Information relating to a named person or any other matter that the committee considers confidential does not have to be made available for public inspection.
14. In the absence of the Chair, the committee shall choose an acting Chair for that meeting from among their number. This committee should not be chaired by a member of staff.
15. In the absence of the local governance professional the committee shall choose a clerk for that meeting from among their number (someone who is not the Headteacher).
16. The draft minutes of each meeting will be circulated with the agenda for the next full meeting of the Local Governing Body and will be presented at that meeting by the Resources Committee Chair (or in his/her absence another member of the committee).
17. Any decisions taken must be determined by a majority of votes of committee members present -no vote can be taken unless a majority of those present are LGB governors.

#### **Risk**

18. To monitor and maintain a risk register for the school on a termly basis, to ensure its effective operation in accordance with the Academy Trust Handbook.
19. To monitor processes for contingency and business continuity plans.

### Financial Policy and Planning

20. To review, adopt and monitor a Finance Policy which includes the local scheme of delegation for spending and budgetary adjustments (virements) for the Headteacher and other nominated staff.
21. To note and monitor all financial policies, including a charging and remissions policy.
22. To establish and maintain a three-year financial plan, taking into the account priorities of the School Development Plan, roll projection and signals from central government, within the constraints of available information.
23. To draft and propose to the LGB for adoption an annual school budget taking into account the priorities of the School Development Plan.
24. To make decisions in respect of service level agreements.
25. To ensure that sufficient funds are set aside for pay increments as set out in the Pay Policy and as recommended by the Headteacher.

### Financial Monitoring

26. To monitor the income and expenditure throughout the year of all delegated and devolved funds against the annual budget plan.
27. To receive at least termly budget monitoring reports from the Headteacher.
28. To utilise Integrated Curriculum Financial Planning (ICFP) and Get Information About Schools school benchmarking tools (available free from the DfE) and/or those available in the Trusts financial planning software to critically assess the school's financial performance.
29. To seek pre-approval of spend that has not been included in the approved budget unless this spend has already been approved by the Trustees at a Board meeting covering a Trust-wide event such as changes to the Teachers Pay Award.
30. To report back to each meeting of the LGB and to alert them of potential problems or significant anomalies at an early date.
31. To receive advice following auditors' reports to the Trust and to recommend to the LGB action as appropriate in response to audit findings.
32. To provide to the Trust financial information required, in a timely manner.

### Premises

33. To provide support and guidance for the LGB and the Headteacher on all matters relating to the maintenance and development of the premises and grounds, including Health and Safety.
34. To ensure completion of all condition surveys (including asbestos and legionella check information).
35. LGB to inform the Trust on an annual basis of their premises development plan.
36. To arrange professional surveys and emergency work as necessary.
  - The Headteacher is authorised to commit expenditure without the prior approval of the committee in any emergency where delay would result in further damage or present a risk to the health and safety of pupils or staff. In this event the Headteacher would normally be expected to consult the Resources Committee Chair at the earliest opportunity.
37. To establish and keep under regular review an Accessibility Plan and a Building Development Plan.
38. To review, adopt and monitor a Health and Safety policy.
39. To ensure that the LGB's responsibilities regarding litter, refuse and dog excrement are discharged according to Section 89 of the Environmental Protection Act 1990, so far as is practicable.

### Staffing

40. To ensure that the school is staffed sufficiently for the fulfilment of the School Development Plan and the effective operation of the school, in compliance with Trust and school policies.

41. To ensure compliance with all Trust HR and employment policies.

### **Terms of Reference – Finance, Revenue, Audit, Pay and Personnel Committee (FRAPP)**

To ensure the Trust Board maintains robust oversight of the Trust's financial performance and assets, it has delegated responsibility to the Finance, Revenue, Audit, Pay and Personnel Committee for **Trust scrutiny and challenge** of all ODBST's financial affairs, stewardship of its assets, and use of its resources efficiently to maximise outcomes for pupils and maintain the Trust as a going concern. Additionally, in its responsibility for Audit and Risk, it provides challenge to hold the Accounting Officer to account for ensuring probity, regularity and compliance in use of Trust's resources and for the technical leadership of the Trust's financial management and procedures and finance team.

### **Membership**

The Trust Board appoints the Finance, Revenue, Audit, Pay and Personnel Committee's membership which is composed of a minimum of three Trustees (including the Chair of the Committee) who possess the skills, knowledge and experience required to fulfil the committee's delegated remit effectively and up to three co-opted non-voting members appointed by the Board. The committee will make recommendations for these appointments. The Chief Finance Officer will attend in an advisory capacity. The Trust Board appoints the committee Chair for a two-year term of office, and to ensure Audit compliance under the terms of the Academy Trust Handbook, the Chair of the Board should not be the FRAPP Chair. An outgoing Chair may stand for re-election. The Committee appoints its own Vice-Chair annually.

### **Reporting**

- The Accounting Officer (AO) and Chief Finance Officer (CFO) should attend to provide information and participate in discussions but are not committee members and have no voting powers. The committee may ask the AO/CFO to withdraw and/or invite other staff/advisers to attend to assist it with any issue(s) it wishes to discuss.
- A Clerk is appointed to the committee, who will produce minutes of all meetings to be circulated with the agenda and papers of the next following full ODBST Trustees' meeting.
- The committee Chair is to formally report to the Trust Board after each meeting, where the minutes will be shared.

### **Quorum and Meeting Frequency**

This committee shall meet at least three times per year and a minimum of three Trustees (including either the committee Chair or Vice-Chair) is required to be quorate. The Trust Board or CEO may ask to convene further meetings if they want the Committee's advice on any issue(s). No vote on any matter may be taken unless a quorum is present. The Chair has a casting vote.

### **Main Duties**

#### **Finance**

1. To recommend to the Board a Financial Manual of guidance incorporating all the finance policies and Schemes of Delegation which will apply to the Trust and all schools within it.
2. To review the Financial Manual annually, responding as appropriate to any recommendations from Internal or External Auditors, and to recommend it annually for review and approval by the Board.
3. To consider, as part of the conditions for joining the Trust, a financial due diligence report (to include a plan for the Financial Management and Governance Self-assessment, FMGS, schedule) from the Chief Finance Officer giving an assessment of the budget position and financial management, of each new school proposing to join the Trust.

4. To recommend to the Board annual budgets and three-year financial plans proposed by Headteachers and LGBs of ODBST schools.
5. To recommend to the Board the ODBST central budget and five-year financial plan, proposed by the Chief Finance Officer.
6. To recommend to the Board the composite ODBST annual budget and three-year financial plans, for submission by the Chief Finance Officer to the ESFA.
7. To recommend to the Board the financial projections which underpin the Trust's Strategic Plan.
8. To consider reports and funding proposals from the trust's School Effectiveness Committee and from the Chief Executive and/or any other committee or working party of ODBST.
9. To consider and explore all means of external finance available to the Trust.
10. To consider expenditure at levels which exceed the Chief Finance Officer's delegated level of authority, and to authorize to the delegated limits of the Committee or recommend to the Board (See Annex A of the Internal Financial Procedures Manual and the School's Scheme of Delegation).
11. To consider regular budget monitoring reports, including monthly monitoring reports as required by the ESFA and periodic strategic financial projections prepared by the Chief Finance Officer, and to submit reports to the Board on the budget position, together with any proposed corrective action to address significant variances between expenditure and budget.
12. To review, where it is available, financial benchmarking to compare expenditure with similar schools, and to advise the Board where appropriate.
13. To recommend to the Board all regulatory financial documentation required by the funding agencies or other government agencies.
14. To determine the Trust schools' admissions arrangements, in line with the agreed Trust policy and the statutory requirements and to advise the Board of the outcome.
15. FRAPP to be made aware of Admissions appeals at schools, with the LGB handling this locally.
16. To maintain a register of business and pecuniary interests for Trustees and Trust Members and ensure that a register is maintained at a local level for LGB governors, both with the support of the Trust's Head of Governance.
17. To review annually all insurance arrangements for the Trust.
18. To receive reports from the Internal/External auditor following each monitoring visit. To consider Auditors' recommendations, and the executive's responses to them, and to oversee the implementation of such recommendations as are approved by the Committee.
19. To recommend the annual review of Internal/External auditors to the Board, prior to the AGM.
20. To recommend the triennial appointment of Internal/External Auditors to the Board.
21. To recommend the annual Audit Plan to the Board.
22. To approve and oversee the Business Continuity Plan, as proposed by the Chief Executive Officer.
23. To review the Risk Register on at least an annual basis, and the High Level Risk Register at every meeting.
24. To agree the Annual Report and Accounts (in accordance with DfE/ESFA, Companies Act and Charity Commission requirements, as prepared by the Chief Finance Officer and Auditors) for approval by the Board and AGM and approve the procedure for their submission.

### **Property and other areas**

25. To ensure that the Trust has a planned site maintenance and development programme strategy for the schools within the Trust, with appropriate timescales and costs.
26. To recommend to the Board updates to the Trust's Health & Safety Policy.
27. To oversee the operation of the Health & Safety Policy with respect to centrally-employed staff.
28. To oversee the Health & Safety action plans of the individual school and ensuring that the Trust takes all reasonable steps to comply with the Health and Safety at Work Act (1974) and related legislation.
29. To recommend the appointment of Property Services providers to the Board.
30. To oversee and monitor property services contracts, implementing the planned site maintenance strategy on behalf of the Board.
31. To oversee and monitor property services contractors implementing new build capital projects in the

Trust's planned development programme and strategy.

### **Pay and Conditions**

32. To consider on behalf of the Trust external directives with the potential to affect the pay and conditions of the Trust's staff and make recommendations to the Board.
33. To review the salaries of centrally employed staff each year, taking account of any recommendations made by officers of the Trust in respect of the annual appraisal process.
34. To review and recommend to the Board changes to the pay policy, having taken appropriate consultation through the Trust's consultative mechanism.
35. To establish arrangements and monitoring facilities to achieve the aims of the Trust's pay policy in a fair and equitable manner.
36. To oversee and monitor the application of the criteria set out in the Trust's pay policy in determining matters relating to the pay of centrally employed staff.
37. To consider and approve recommendations for discretionary payments.
38. To consider and approve changes to job grading for existing/new posts.

### **Personnel**

39. To recommend to the Board updates to any pay and personnel related statutory and other policies to be adopted across all the Trust's schools- e.g. - e.g. appraisal, disciplinary, equality.
40. To approve a procedure for establishing appointment panels, where required, for staff at Headteacher and Deputy/ Assistant Headteacher level.
41. To advise the Trust on the implication(s) of any changes in employment legislation affecting its operation and activity.
42. To receive, consider and approve changes to the management structure of the Trust's schools.
43. To be notified of any disciplinary/grievance, and provide support as appropriate, as set out in the relevant Trust policies.
44. To hear appeals against dismissal, as set out in the Trust's policies.

### **With respect to Other Matters**

45. Self-evaluate the committee's own effectiveness and impact on Trust's performance annually.
46. In exceptional circumstances, for example where the ODBST Calendar of Meetings indicates that there is no immediate meeting of the SEC Committee or the Full ODBST Board, policies that are normally the responsibility of these bodies may be considered, reviewed and approved by the FRAPP subject to the agreement of the appropriate SEC or Full Board Chair.
47. Taking urgent decisions: clearly it is best that all decisions are taken collectively by the Board or its Committees. However, there may be circumstances where an urgent decision needs to be taken but it is not possible to convene a meeting of the Board or its Committees or hold a quorate meeting. In most cases, urgent decisions will be possible through email agreement with the item being emailed to all members of the Board or Committee and the Clerk, and agreement or otherwise being emailed (reply all) so that all members can take part in the discussion and the outcome noted by the Clerk to the Board. However, the Chair (or in the absence of the Chair, the Vice Chair) of the full Trust Board or any of its Committees has the authority to take urgent action on matters that are delegated to that Board or Committee between meetings, where the delay in exercising a function is likely to be seriously detrimental to:
  - the interests of the Trust
  - a school
  - pupils or parents/carers at a school
  - or employees of the Trust.

All such actions should be reported to the next meeting of the relevant Committee or Full Trust Board by the Chair or Clerk and noted in the minutes.

### **Terms of Reference for School Effectiveness Committee (SEC)**

To ensure the Trust Board maintains robust oversight of the quality of education, both academic and spiritual, provided across the Trust, it has delegated responsibility to the School Effectiveness Committee (SEC) to deal with any matter falling within its terms of reference. With regards to School Improvement, to additionally ensure that Christian distinctiveness is upheld in church schools and permeates all aspects of school improvement. With regards to Curriculum and Ethos, to ensure that the distinctive Christian values of ODBST are upheld and supported in its schools and through SIAMS.

### **Membership**

The Trust Board appoints the committee's membership which is composed of a minimum of three Trustees who possess the skills, knowledge and experience required to fulfil the committee's delegated remit effectively. The committee may co-opt additional non-voting members to provide specialist skills. The committee may make recommendations for these appointments. The number of Trustees must exceed the number of co-opted members. Employees should not be committee members. The Trust Board appoints the committee Chair for a two-year term of office. An outgoing Chair may stand for re-election. The committee appoints its own Vice-Chair annually.

### **Reporting**

- The Director for Education is to attend the committee's meetings and report as the responsible officer for educational improvement across the Trust's academies. The Chief Executive Officer may attend the committee's meetings and participate in discussions. The CEO and DE are not committee members and have no voting powers. The Committee may ask the CEO/DE to withdraw and/or invite other staff/advisers to attend to assist it with any issue(s) it wishes to discuss.
- The committee Chair is to formally report to the Trust Board after each meeting.
- A Clerk is appointed to the committee, who will produce minutes of all meetings to be circulated with the agenda and papers of the next following full ODBST Trustees' meeting.

### **Quorum and Meeting Frequency**

This Trust committee shall meet at least three times per year and a minimum of three Trustees (including either the Committee Chair or Vice-Chair) is required to be quorate. The Trust Board or CEO may ask to convene further meetings if they want the committee's advice on any issue(s). No vote on any matter may be taken unless a quorum is present. The Chair has a casting vote.

### **With respect to School Improvement**

1. To ensure Christian distinctiveness is upheld and permeates all aspects of school improvement.
2. To ensure and review the regular evaluation of schools' attainment, pupil progress, attendance and general improvement via termly reports from the Director of Education.
3. To ensure school targets are appropriately set to maximise attainment and pupils' progress.
4. To evaluate the schools' performance through a range of measures including their own SEF, Ofsted and SIAMs reports, ensuring appropriate action is planned and taken, in order for the school to meet agreed targets.
5. To ensure that all reasonable measures are taken to ensure that pupils' SEND requirements are being

met, through annual SEND reviews, and including the effective deployment of Pupil Premium Grant.

6. To ensure that an appropriate, high- quality School Development Plan is written and in place and implemented and regularly monitored and reviewed at Local Governing Body level.
7. To support and encourage curriculum development, engaging with national guidance as appropriate.
8. To monitor the impact of any external partnerships commissioned by the Trust to support its schools (e.g. Oxford Brookes School of Education, Challenge Partners etc.)
9. To evaluate summative information on the performance of its schools comparing this to national benchmark figures.
10. To ensure that school improvement resources are properly prioritized.
11. To be made aware of school Exclusions and actions taken where necessary

### **With respect to Curriculum & Ethos**

12. To monitor the effectiveness and impact of partnerships between key stakeholders.
13. To support and monitor schools' empowerment of children and young people particularly through pupil voice.
14. To monitor the effectiveness of school to home communication, with a focus on how effectively the school communicates its values to the parents and wider community, thereby ensuring quality communication through listening to parents in the community and responding to need.
15. To promote and develop and evaluate the effectiveness of links between schools and local parish churches (CE schools).
16. To monitor the pastoral care and safeguarding of children in schools.
17. To monitor how schools meet the needs of learners through their ethos and unique set of values and, for church schools, their distinctive Christian character.
18. To ensure that all ODBST schools are compliant with statutory safeguarding requirements and strategies.
19. To support and develop the Spiritual, Moral, Social and Cultural aspects of schools, including the provision and impact of collective worship.
20. To monitor personal development, behaviour and welfare outcomes for schools.
21. To provide Relationships Education, and Equality and Diversity Policies for schools, monitoring and reviewing their implementation.
22. To promote and develop links between schools and other faith organisations.
23. To monitor and critically evaluate the vision and values of the trust, ensuring effective communication of them to schools and other stakeholders.
24. To work collaboratively with the Diocesan Board of Education to support the fulfilment of its core aims and statutory responsibility for church schools.

### **With respect to Other Matters**

25. Self-evaluate the Committee's own effectiveness and impact on Trust's performance annually.
26. In exceptional circumstances, for example where the ODBST Calendar of Meetings indicates that there is

no immediate meeting of the FRAPP Committee or the Full ODBST Board, policies that are normally the responsibility of these bodies may be considered, reviewed and approved by the SEC subject to the agreement of the appropriate FRAPP or Full Board Chair.

27. Taking urgent decisions: clearly it is best that all decisions are taken collectively by the Board or its Committees. However, there may be circumstances where an urgent decision needs to be taken but it is not possible to convene a meeting of the Board or its Committees or hold a quorate meeting. In most cases, urgent decisions will be possible through email agreement with the item being emailed to all members of the Board or Committee and the Clerk, and agreement or otherwise being emailed (reply all) so that all members can take part in the discussion and the outcome noted by the Clerk to the Board. However, the Chair (or in the absence of the Chair, the Vice Chair) of the full Trust Board or any of its Committees has the authority to take urgent action on matters that are delegated to that Board or Committee between meetings, where the delay in exercising a function is likely to be seriously detrimental to:

- the interests of the Trust
- a school
- pupils or parents/carers at a school
- or employees of the Trust.

All such actions should be reported to the next meeting of the relevant Committee or Full Trust Board by the Chair or Clerk and noted in the minutes.

## **Appendix 2 – Our Member and Trustee profiles**

### **ODBST Members**

#### **The Rt. Revd. Dr. Steven Croft**

The Rt. Revd. Dr. Steven Croft became Bishop of Oxford in 2016. He was previously the Bishop of Sheffield, team leader of Fresh Expressions, Warden of Cranmer Hall, and Vicar of Ovenden in Halifax. He is co-author of Emmaus and Pilgrim Resources. His latest book is The Gift of Leadership (Canterbury Press, 2016).

#### **Oxford Diocesan Board of Education**

**Oxford Diocesan Board of Education acting corporately (current named officer: Gordon Joyner).** The Oxford Diocesan Board of Education is a member acting corporately by hand of one of its directors.

#### **Peter Norman**

Peter was head of The Warriner School, Oxfordshire (2001 - 2007) and Waddesdon Church of England School, Buckinghamshire (2007 - 2017). He has served as an ex-officio governor at both The Warriner and Waddesdon CofE School and as a parent governor and chair of governors at Waddesdon Village Primary School, Buckinghamshire. Peter is a member of the Diocese of Oxford Board of Education and currently chairs the School Effectiveness Committee and serves on the Executive Committee.

#### **Malcolm Peckham**

Malcolm has taught in secondary modern, technical, comprehensive, grammar schools and an FE college before entering education administration. He held senior posts in Buckinghamshire and Croydon before being invited to establish a new LEA as the Director of Education in the Royal Borough of Windsor and Maidenhead. Malcolm chaired the Wycombe and Marlow Teaching Schools Alliance, is a past director and trustee of the Wycombe High School MAT and a past treasurer and tutor at the London School of Theology where he remains as a member. He retired as a Magistrate after twenty-two years service. He is a life member of the Magistrates' Association and a Fellow of the Howard League for Penal Reform. He is a member of Keele University's College of Fellows and received an Honorary Doctorate in 2015. Malcolm was a Trustee of the Oxford Diocesan Bucks Schools Trust from 1st October 2018, and was then elected as Chair the following year and remained in this position until he stood down from the Board of Trustees in July 2022.

### **ODBST Trustees**

#### **The Bishop of Buckingham (Rt Revd Dr Alan Wilson)**

The Bishop of Buckingham (Rt Revd Dr Alan Wilson) has served in the Diocese of Oxford since 1979, at Balliol College 1979-81 and NSM at Eynsham, then Curate of Caversham & Mapledurham (1982-89), and first incumbent of St John the Baptist Caversham from 1989-92. Moving to Sandhurst as Rector in 1992, he contributed to continuing ministerial education by developing residential training workshops in supervision skills for training incumbents, and as a Diocesan Work Consultant.

He led the planning group for the Diocesan Convention at High Wycombe in 2002. He was Area Dean of Sonning from 1998-2003, and honorary Canon of Christ Church, Oxford 2002-3. In October 2003 he became Area Bishop of Buckingham.

### **Tony Wilson**

Currently the Director of Education for the Diocese of Oxford, Tony possesses extensive headship experience including providing intervention for schools in challenging circumstances as well as leading a school designated as outstanding. Tony has led two different schools towards good and in another was able to raise the school's Progress 8 performance from being well below average to above the national average at the same time as eradicating a budget deficit of -£2 million. He oversees all aspects of the Oxford Diocesan Board of Education's work across 283 schools, 19 MATs and 9 local authorities. In addition, Tony has international school improvement and system leadership experience gained from his role as Principal Education Consultant in The Kingdom of Bahrain and is the director of an educational consultancy.

### **Denise Shepherd**

A highly successful senior educational leader with over 30 years of experience. Headteacher of an outstanding Grammar School, National Teaching School, and National Support School. The founding CEO of the Thinking Schools Academy Trust a high performing Multi-Academy Trust in the Southeast (TSAT). A designated National Leader of Education since 2010 and an elected member of SESL Headteacher Board advising the RSC. As CEO Denise has successfully sponsored and turned around several high-profile failing schools. After leaving TSAT at the end of 2016 Denise supported a small MAT of Free Schools to improve their educational standards, develop and undertake their first Ofsted inspections. All schools were rated as good or outstanding by Ofsted 2017-2019.

### **Rosie Harper**

Rosie runs a three church Parish with a large turnover. Rosie is a member of the Archdeaconry senior staff with oversight of 270 churches, a member of Bishop's Council: The Governing body of the Diocese of Oxford, and a trustee of the Oxford Diocesan Board of Finance. She is an elected member of The General Synod of the Church of England.

She is the chair of the Oxford Nandyal Education Foundation -an education charity in India. All these roles give her experience of Trusteeship, strategic planning, financial planning and compliance, change management, values-based judgement, safeguarding matters and relationship and team building.

### **Michael Phipps**

Michael is a retired Department for Education senior civil servant, who had responsible for policy advice to Ministers on school sector, managing passage of education legislation through Parliament, delivering various school standards programmes, and directing various major public expenditure programmes amounting to several hundred £million.

He has been chair of governors of Seer Green CE Primary Academy for the last 5 years steering its academy conversion in 2013 and preparation for successful Ofsted and SIAMS inspections in 2017; initiating development of the new vision, values and strategic 5-year plan; introducing new school and governing board self-evaluation programmes; he led the headteacher recruitment process in 2015/16; is chair of its admissions and performance management committees, and of various working groups.

Michael is an experienced trustee of several charities both large and small. He chaired two Quaker church boards of trustees: one local for Buckinghamshire (annual turnover up to £100k), one national for whole of UK (100+ staff, annual turnover £10m).

### **Michael Mill (Chair of Trustees)**

Michael has had significant experience in the public sector in local government, having worked at a senior level in Buckinghamshire and Oxfordshire education departments. He was Diocesan Director of education for Carlisle Diocese and was instrumental in setting up the diocesan multi academy trust, as its first CEO. He also worked in consultancy developing major government capital schemes. Michael has lived most of his life in Buckinghamshire and begun his working career teaching in High Wycombe.

### **Andrew Jeffrey**

Andrew is currently a manager in the 'Not for Profit' team at Cooper Parry which has a significant Not for Profit and Academy presence in the Midlands. Andrew joined Cooper Parry in August 2019 when the Education team at Whitley Stimpson Limited transferred their Academy and Not for profit portfolio to facilitate the team's growth and knowledge base. He has over 12 years' experience with audit and accounting. In 2014 he joined the Whitley Stimpson newly created Education team, having previously completed his training as a Chartered Accountant there.

Andrew specialises in the education and charity sector and has worked with, and advised, a diverse range of educational organisations, including Academies, Free Schools, Independent Schools, Further Education colleges, Catholic Education offices and systemic schools as well as a wide range of local, regional, and national charities. Andrew's role in particular within the education team has been to work closely with Academy Trusts, not only through the audit and production of year end accounts, but also providing financial advice and support to schools and assisting them in undertaking and completing the relevant reporting requirements of the ESFA.

He has also been a church warden within his local community since 2012.

### **Sulina Piesse, ex-officio, Chief Executive Officer**

Sulina is the Chief Executive Officer for the ODBST. Sulina has worked in education for 20 years and has been a senior leader for the last 16 years. She has held two successful headships where outcomes for children have been strong. Sulina is well versed in all areas of school improvement having had training as an Ofsted Inspector. She was an Ofsted Inspector for several years during her time as a Senior Leader. She has mainly spent her career in Secondary education, although the latter part of her work has been with Primary as well. She has a fervent passion for teaching languages and has taught French and Spanish in an array of different schools across all age ranges. She has led on whole school projects and has often been contracted to provide training on whole school curriculum and timetabling and has been instrumental in working on new school capital build projects. As a passionate educationalist, she holds two Master's in degrees, the National Professional Qualification for Headteachers and is currently completing her Doctorate in Education.

### **Kieran Soughton**

Kieran is an experienced, highly commercial HR organisational development and change management specialist, with a wealth of mergers and acquisitions experience. He has experience in the UK and overseas, at both operational and strategic levels and is able to add real commercial value to an organisation through an understanding of the business drivers. He has been a Board member of several organisations, specialising in HR and also including business risk and business strategy, as well as culture and change management.

### **Appendix 3 - Our Unique selling points as a Church of England Trust**

- We are a trust with clarity about our mission and vision, with our strong Christian ethos underpinning everything we do
- Our strategic plan seamlessly sits within individual school plans
- There is clear accountability that enables discussions to take place from the Trust Board Chair to the CEO, the Trust Board Chair to Chair(s) of any local governing bodies, the CEO to Principals and Principals to their team members that improves standards
- The Trust has a common understanding of what outstanding performance is and has a strong, bespoke Professional Development program to support staff across all our schools
- Our local governing bodies are effective at quality assuring standards at their school and the CEO, and the Shared Service Team are subject to the same scrutiny
- The Trust continuously supports and challenges its schools to be able to serve the community and ensure all children live life in its fullness
- The Trust's school improvement strategy is built around an emerging pool of talented teachers and leaders who know the impact of their work and can name it and describe it
- The Board risk is managed well and there is a clear relationship between risk and mitigation
- The Trust has a talent management plan that has matured and now includes staff at all levels across the Trust
- Senior leaders are encouraged to support in more than one Trust academy and middle leaders and the best teachers are deployed across the Trust to sustain and deepen impact
- The Trust is a key part of the regional system leadership capacity to improve standards for all and works to support and challenges new and experienced schools
- Our Shared Services Team are available to offer tailored one to one advice in their key areas of expertise to schools
- ODBST are proud to have signed up to the Department for Education's Staff Well-Being Charter and established a well-being ambassador group to enhance staff well-being across the Trust. We have open channels of communication and encourage well-being suggestions from our staff
- ODBST run a comprehensive and accessible CPD program throughout the academic year; this includes tailored Subject Leader sessions and evening-based Governor training. We are passionate about the development of the staff and volunteers in our schools.

## **Appendix 4 - ODBST's growth plan which shows how we can accommodate this application**

### **a. Why ODBST?**

Headteachers and chairs of governors cite a strong sense of purpose and an aspiration to improve their schools within the supportive framework of a diocese with a powerful and proven track record in school support and challenge, as key drivers for joining ODBST. The Multi Academy Trust (MAT) structures allow member schools to build on existing partnerships, work collaboratively, and build on ODBST support for one another to improve pupil outcomes and the effectiveness of leadership, management, and governance.

The MAT model has also allowed them to capitalise on the benefits of this approach, including:

- sharing best practice
- economic benefits, such as centralised services
- the ability to focus funds where they are most needed
- increased and flexible staffing resources
- the opportunity to establish succession planning programmes and, in doing so, retain good staff who might otherwise move on – including headteachers

For ODBST schools, a MAT model has enabled them to remain local but also to grow and improve, finding support from a wider network of schools. Equally, the ODBST model offers a school the potential to retain its unique characteristics and maintain its own local governing body. It also offers headteachers a high degree of autonomy in leading their schools, whilst giving them the support and challenge to focus on teaching and pupils' outcomes.

Our schools all sought a MAT whose philosophy and values were strongly aligned with their own. They also valued the experience and expertise in school improvement that ODBST offered. This support structure, time and expertise made a significant difference to leaders and chairs of local governing bodies by allowing them to maintain a strong focus on teaching and learning.

Our schools see the benefits of being part of a MAT. These include:

- high-quality staff development
- support for key HR, Operations and Finance functions
- established legal, site and transfer experience
- focused advice and guidance on admissions and the potential to review admission numbers and age ranges with confidence
- investment & understanding of school facilities & premises issues
- greater community involvement
- a clearer identity and focus
- a stronger focus on teaching and learning
- a stronger focus on data and pupil attainment
- more effective governance.

**b. What Next?**

A DfE- report, *multi-academy trusts good practice guidance and expectations for growth* offered advice and guidance for board's wanting to expand and remain effective providers in the same position that ODBST finds itself in.

**Growth and development**

The report is clear that effective providers:

- a. have clear and realistic visions for the future size and structure of the MAT
- b. have conducted a thorough, review of its own effectiveness and readiness for growth and in particular has a clear view of the skills it will need in its next phase of growth and robust plans in place to fill any gaps through training or recruitment
- c. have worked on common information management and reporting standards and processes across all schools in the MAT to enable comparison and aggregation of data at board level

**Portfolio of schools**

- d. In most reports on MAT growth it is seen as preferable to have a mixed portfolio of schools – specifically a balance of sponsored and converter projects. Chains with exclusively primaries also appear to find it tougher – although our local diocesan evidence shows that primary specialists can thrive
- e. When planning growth trustees consider the geography of the MAT, planning development in terms of clusters and understand the risks of adding isolated schools to chains

**People and leadership**

- f. The leadership of high performing chains tend to be focused around strong, ambitious, and determined leaders with clear moral purpose – an appetite to grow is healthy but in ODBST is focused on delivering great outcomes for the schools in the trust first.
- g. Vision and purpose are well understood throughout the organisation
- h. Appointing trustees with strong commercial skills at board level is seen as crucial - the importance of these skills increases when chains grow beyond 4 - 5 and ODBST has an active board with a clear match of skills to need
- i. High performing trusts like ODBST makes the most of cross-chain CPD and progression opportunities. This is particularly strong within the diocesan links
- j. As trusts grow beyond 5, a full-time financial director has been seen as essential and we have already recruited this person

**Governance and finance**

- k. Clear accountability and governance are vital
- l. Proactive, innovative ways to achieve efficiencies
- m. Formulate a business model – capitalising on what others have done
- n. Keep the academy charge and central services under review
- o. Strong financial planning is vital. If you have very strong school improvement and nothing goes wrong you may be lucky for a while but cannot rely on this

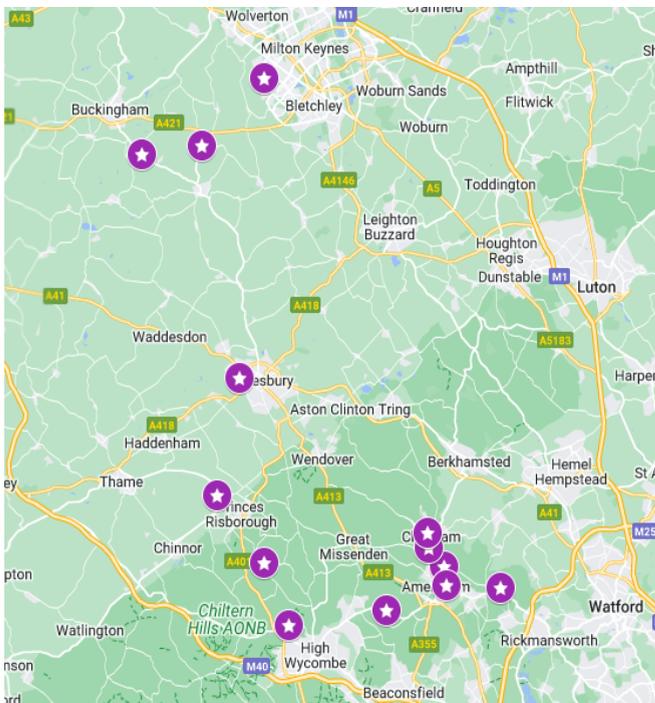
**School improvement**

- p. The initial phase of development has been prescriptive even with schools which are performing well – but the trust takes swift and assertive action with failing schools.

### c. Growth Strategy?

ODBST is growing its membership because of:

1. The growing reputation and attraction for schools of ODBST considering becoming an academy
2. The education in local authority services
3. The Regional Director's (RD's) provision of sponsored capacity for ODBST and statement of confidence in the trust as a capacity giver within the local system.
4. Active and effective marketing
5. Unlimited 1:1 telephone and email access to advice from an experienced ODBST Shared Services Team which include specialist Safeguarding and SEND support.



#### Our family of schools in the ODBST

Chesham Bois CE School  
 Thomas Harding Junior School  
 Great Horwood CE School  
 Padbury CE School  
 St John's CE Primary School, Lacey Green  
 Longwick CE Combined School  
 Christ the Sower Ecumenical School  
 Woodside Junior School  
 Curzon CE Combined School  
 Elmtree Infant School  
 The Downley School  
 Chenies School

Current regional structures allow us to consider schools in 4 geographical hubs:

- Hub 1 – Great Horwood, Padbury, Christ the Sower
- Hub 2 – St John's Lacey Green, Longwick, Downley
- Hub 3 – Thomas Harding, St Mary's Aylesbury, Elmtree,
- Hub 4 – Chesham Bois, Woodside Junior, Curzon

Other applications which do not support this model will need careful consideration on the supporting structures and capacity of the MAT to take on additional geographical structures and direct permission from the RD/DfE.

#### **d. Agreed Growth Plan**

1. The Trustee's plan is for the Trust to grow gradually, acknowledging the need for a balanced portfolio. Growing the Trust is about adding value to our current schools as well as extending our reach to serve more pupils and communities to advance education for public benefit.
2. Such growth will be within the episcopal area of Buckinghamshire and Milton Keynes and support the current cluster model and will warmly welcome all phases of schools. We have the experience and expertise in Primary and Secondary sectors.
3. That such growth should consider the balance of schools so that resources and services are not impacted by taking on, for example significant numbers of sponsored academies or very small schools.
4. Officers are empowered to talk to schools seeking information about academization and information about ODBST without approval from Trustees.
5. Information about these contacts will be shared regularly within the 'pipeline' report to full board and committees.
6. Minuted permission to move on an application will be confirmed by the production of a 'project plan' for each potential school prior to due diligence activities.
7. Post due diligence at Trust Committee Meetings approval will allow Officers to move to an application and associated resource allocation to the project.

## **Appendix 5 -ODBST's Shared Services Team offer**

### **ODBST enables school leaders to focus on the local needs of their school.**

#### **School Improvement**

- A bespoke package of up to six school improvement support visits provided by ODBST Officers and advisers and consistent and robust data collection and monitoring. Visit 5 and 6 may be combined into one full day by two people for annual review and to determine next steps forward.
- Schools at risk of underperforming get additional support which may be in the form of visits from ODBST officers, paid support from other ODBST schools or external specialist support. Schools underperforming have regular meetings with the Director of Education to monitor progress against key targets and to make sure that the right support is going into the school.
- Brokering of leadership support gives our aspirant leaders the opportunity to work with other schools to gain experience while being supported by the central SI team.
- Headteacher mentoring and coaching, including access to training courses run by ODBE. There are bespoke sessions for Headteachers and Deputy Headteachers, leadership meetings and a leadership conference. HUBs provide peer to peer leadership support.
- Leadership support for OFSTED inspections. This includes website checks, time spent coaching and preparing HTs, practice phone calls, extra time spent in schools doing more work/spending more time with HTs, safeguarding checks, LGB preparation work, IRR reviews, being on site during the inspections when HTs have wanted it, working late into the evenings to support HTs between inspection days.
- School Effectiveness Partner support for all Ofsted Inspections– this includes support for post inspection Statement of Action.
- Compliance checks and contracts.
- Professional learning and development including termly Subject Leader training and annual Leadership conferences for School Leaders and Governors.
- Respond to central and local government consultations and provide support for schools to engage in these.
- Develop and consult on statutory trust wide policies and provide guidance and templates on other policies for LGBs and support materials to ensure compliance of schools with statutory requirements.
- Unlimited 1:1 telephone and email access to advice from experienced ODBST advisers.
- Safeguarding checks, monitoring of safeguarding, purchasing of CPOMS.
- Setting of Headteacher PM objectives and bi-annual review.

#### **Governance package**

- Provision of phone/e-mail support to clerks, governors and Headteachers in ODBST schools.
- Provide guidance to local clerks on meeting structure, agendas, and other local governance templates.
- Carry out reviews of governance/compliance as appropriate.
- Provide guidance on the recruitment of new governors and support the processing of Trustee and foundation appointed governors.

- Hold accurate records of all governors within the Trust.
- Support with advice on governance compliance of school websites and GIAS.
- Guide clerks and governing bodies of prospective ODBST schools through the conversion process and any steps required on the route to becoming an academy
- Provide resource support to clerks and governors through the Governor Hub site.
- Support the induction of new governors by offering and signposting training, plus delivery of termly and other bespoke training to governors.
- Provide support on the scheme of delegation and term of reference.

### **Finance & Audit**

- Individual school bank accounts enable local monitoring of cashflow and flexibility with purchasing.
- All schools use the same financial IT system for budgeting and financial monitoring.
- Annual external and internal audit requirements are centrally managed, including pension audits for Teachers Pension & LGPS.
- A support network for school business managers, including training and 2 SBM meetings per Term.
- Assistance with SBM recruitment.
- Central team supports schools with the requirements of the Academy Trust Handbook and manages any Finance Related Policy changes.
- One Gift Aid account with HMRC to recover gift aid claims, one registration for the Trust.
- Centralised VAT recovery on behalf of the schools, again one registration.
- SRMSAT submitted by Trust based on data from the common finance system.
- One submission of consolidated budget to the DfE.
- Finance Training for Head Teachers and Aspirant Leaders.
- Finance support for school run tenders.

### **Human Resources**

- Support with the TUPE and onboarding process for existing staff.
- Support from our team of HR professionals who know each school and are able to provide consistent advice and guidance on all aspects of HR (policies, recruitment, restructures, disciplinary, appraisal etc).
- One payroll provider as appointed by the Trust.
- Centrally issued employment contracts, at the request of schools who lead on local recruitment.
- Membership of the Teacher Pension Scheme and Local Government Pension Scheme ensures staff retain pension benefits.
- Well-being ambassador group, well-being helpline (Employee Assistance Programme) and resources.
- Support with senior level recruitment.
- Provision of My New Term recruitment applicant tracking software.

- Additional HR support for employee relations issues.
- 1:1 support for Heads is available at any time.
- HR Document store – A ready to use suite of HR templates.
- Regular HR support meetings for school leadership and office.
- Quality assurance visits on single central records and employee files.
- Provision of HR CPD.
- Management of the apprenticeship levy and apprenticeship training providers.
- Provision of HR policies that are regularly reviewed and compliant with UK employment law.

### **Operations (including H&S)**

- ODBST has one registration with the ICO on behalf of all its schools and one central Data Protection Officer.
- Support for GDPR compliance, subject access requests, data breaches and training.
- Our professional Health & Safety Competent Advisor engages regularly with schools to assure their legal duties, ensure the school site is safe and secure, and undertake annual health and safety site review plus inspection of PE, outdoor play and DT or ceramic equipment. All Trust schools use the same fire safety and health and safety compliance software.
- Procurement (including economies of scale across multiple schools).
- Net Zero and Sustainability programme, with advice & support on achieving Trust goals.
- Risk management (support & advice on risk registers.)
- Support with capital projects, school building and site strategic improvement and maintenance plan, sourcing funding, contract management,
- Access to legal services and advice. Eg lease renewals.
- RPA advice.
- IT systems advice and joining of Trust wide contracts for energy, safeguarding, insurance and IT.
- School Management Information System (MIS) support. The Trust uses Bromcom MIS.
- Regular Operations and HR support meetings.
- Regular Site Manager/Caretaker meetings.
- Operations Handbook to support joining the Trust and those new to role.
- Onsite visits on request to support projects or problems.
- Provision of Operational/H&S/GDPR policies ready for use.

### **Admissions**

- The Trust Board is the admission authority. Support for School Admissions and Appeals is provided by the Diocese.

### **Capital Projects**

- Large-scale capital projects are funded through Condition Improvement Fund bids that the Trust will support the schools on applying for. Additionally, through ODBE there is access to Surveying and Project Management resources, and these are charged at cost to the projects.
- Devolved Formula Capital continues to be managed by the Local Governing Body but is required to be authorised through the approved purchasing limit guidelines. LGBs are the experts on what is required for their schools and can advise on prioritisation and organise tenders, but the Trust signs off on the proposal and has control over the release of funds.

### **Centralised IT Purchasing**

- The Trust has a Trust wide contract for the following services that are not included in the service charge and are recharged to the schools at cost:
  - Broadband, Communications & Internet Based Telephony (VoIP) – includes filtering, cyber security, safeguarding software & alerts, anti-virus software
  - Managed Service Provider – supporting the schools IT requirements, assisting in purchasing IT equipment, maintaining the schools' intranet, ensuring licences are compliant and that all patches and upgrades for software are completed
  - MIS – Bromcom is the MIS of choice for the Trust and this includes assessment tracking, parent email, parent pay services
  - Other Centralised contracts cover - Absence Insurance, Printing solutions, InVentry Access System, NGA, The Key

Academies within ODBST predominantly receive support from Trust officers and, for some specific areas, from colleagues from Oxford Diocesan Board of Education (ODBE). This support is funded through a central service charge, which is retained by the Trust from the funding provided to the school from the Education and Skills Funding Agency (ESFA). The central service charge reviewed annually. There are some mandatory systems, which may or may not be covered by the service charge. Please note, the details are subject to change.

We aspire for every pupil and adult to 'experience life in all its fullness' (John 10:10)



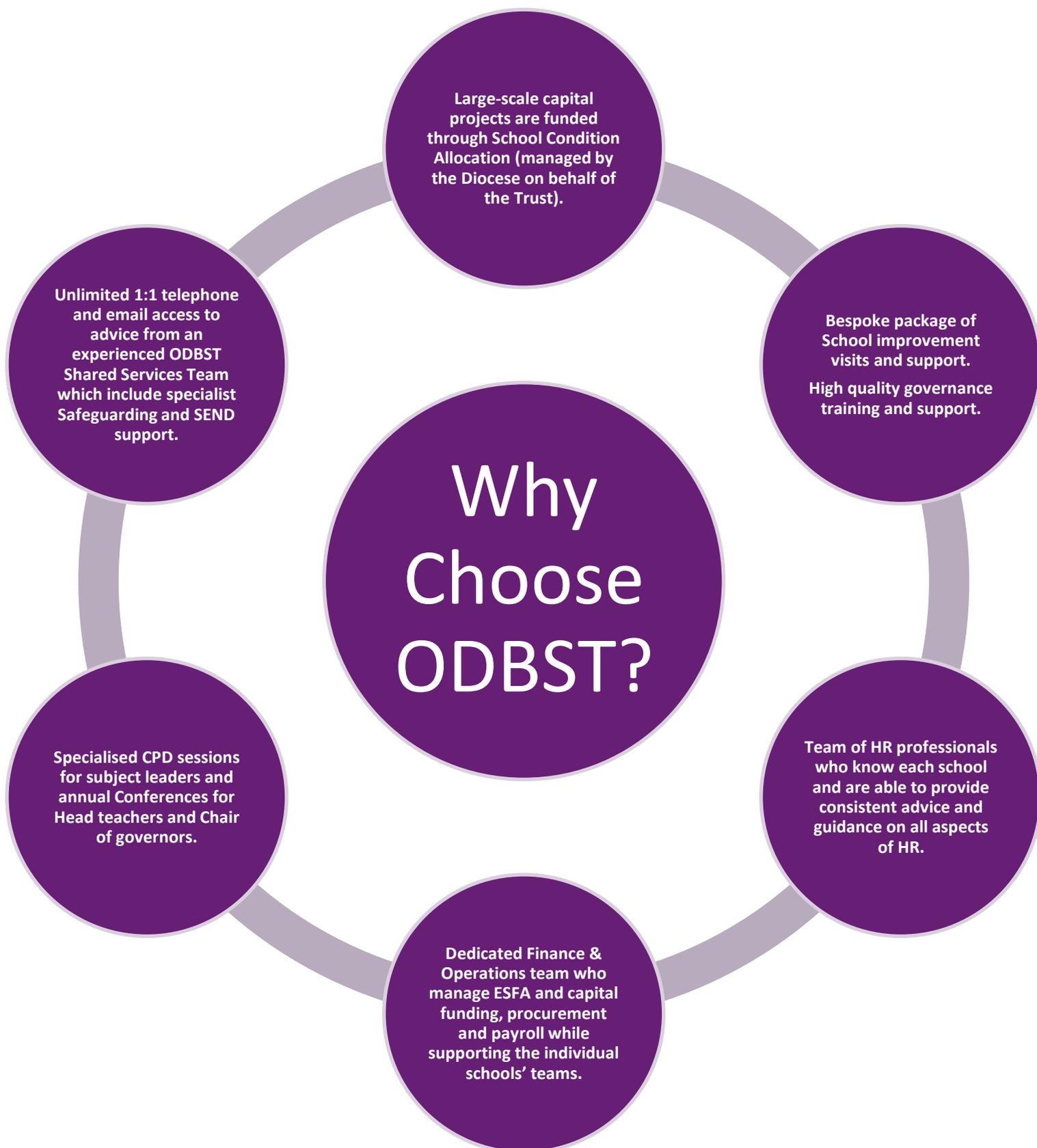
## Oxford Diocesan Bucks Schools Trust

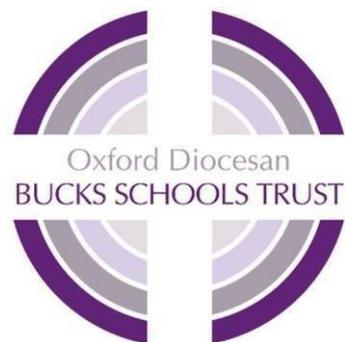
*"Empowering our unique schools to excel"*



### ODBST's Shared Services Team 2023/2024

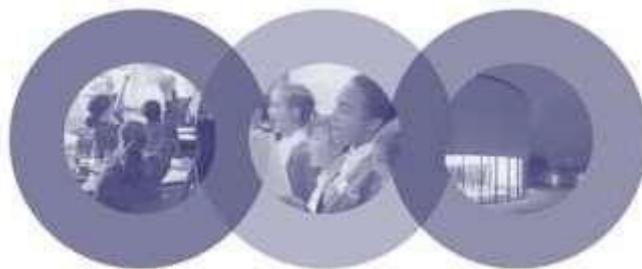






## The Oxford Diocesan Bucks Schools Trust

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