



## **BPET Local Advisers' Handbook 2019**

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## **1.0 Bellevue Place Education Trust – Our commitment**

### **Learn, Enjoy, Succeed**

Every BPET child and staff member enjoys a broad (LEARN) and enriched (ENJOY) learning experience, enabling them to achieve far greater individual success (SUCCEED) than they might previously have thought possible.

### **Our Mission**

To grow hubs of like-minded, autonomous schools, well-supported, all of which combine academic rigour with highly enriched opportunities that deliver a personalised approach to education and exceptional outcomes for all.

### **Our Difference**

We are leading the way in delivering high quality education through a skills-based curriculum, applying the best of the independent and state sectors to deliver breadth of opportunity and pupil enrichment. We empower all our schools as individual entities that best meet the needs of the communities they serve and have a strong relationship with parents, who are our key partners in delivering the vision.

### **Our Promise**

Every child is an individual. Our role is to nurture pupils' potential through a personalised approach to learning. BPET children are happy, independent, confident all-rounders. We encourage a 'be interested and be interesting' attitude in children and staff alike. We don't just teach; we want our pupils to have a passion to learn. Our focus is on all pupils, regardless of background or academic ability, focusing on pupils with Special Educational Needs as well as those who are more-able.

## **2.0 Aim of this BPET Local Advisers' Handbook**

As the sponsor, Bellevue Place Education Trust's (BPET) core purpose and responsibility is for establishing, maintaining and managing schools. This Local Advisers' Handbook contributes to delivering the vision of the Trust. It outlines the responsibilities of a BPET Local Advisory Board (LAB) for its school and how it will be structured to support the school in delivering high quality education to the pupils, parents and the local community it serves. The LAB works with the Headteacher to set the strategic direction of the school, within the vision of the Trust.

This BPET Local Advisers' Handbook is for local advisers, Headteachers and clerks. It sets out the role of a Bellevue Place Education Trust LAB, by:

- Outlining the core role and functions of the BPET LAB, along with the terms of reference for the LAB
- Outlining the membership of the BPET LABs
- Setting out the structure and areas for which the Local Advisory Boards are responsible
- Describing the flexibility that LABs have to respond to the needs and circumstances of each school

Bellevue Place Education Trust values every person who volunteers to help provide a high-quality education offer to pupils by being a local adviser. How well a LAB conducts its role has a significant impact on the success of the school. Therefore, although LABs are made up of volunteers, LABs must act professionally at all times and be accountable for their effectiveness.

Local advisers should be mindful in exercising the LAB functions and be aware of and accept the seven Nolan Principles of public life, which are selflessness, integrity, objectivity, accountability, openness, honesty and leadership.

### **3.0 Why be a school local adviser?**

Serving as a local adviser helps individuals develop board-level skills and expertise that may not otherwise develop until much later in their careers. The learning and development benefits are therefore significant and more than compensate for the flexibility and time off that advisers may need to fulfil their local adviser duties.

The role provides satisfaction to an individual who can influence children's education by using the skills and expertise they have developed along with their passion that can be brought to the role. The time commitment given is not great, though all local advisers are asked to attend all full Advisory Board meetings; and undertake school visits. If an individual's attendance record falls below 50%, local advisers will be asked to consider if they have the capacity to fulfil the role.

### **4.0 Terminology**

Throughout this document the following terms will be used:

**The Trust** – refers to the Bellevue Place Education Trust.

**BPET Board** – The Bellevue Place Education Trust (BPET) Board of Trustees has overall responsibility for the maintenance and management of the schools in the Bellevue Place Education Trust.

**Member** – they are akin to shareholders and are the subscribers to its articles of association. Members have the power to appoint and remove trustees.

**Trustee** – they are directors of the charitable company. They are responsible for ensuring the Trust meets its charitable objectives, as well as compliance with charity law and the academy trust's funding agreement. A Trustee sits on the BPET Board.

**Local Advisory Board (LAB)** – each BPET school will have a Local Advisory Board, which is a committee of the BPET Board.

**Local Adviser** – this is a member of the Local Advisory Board. The Local Adviser Code of Conduct can be found in **Appendix A**.

## 5.0 Who are Bellevue Place Education Trust?

BPET is a new model for education delivery in the state sector. The organisation is a joint venture between two organisations who are passionate about providing high quality education provision. These two organisations bring together the very best of the fee-paying Independent sector – Bellevue Education Ltd – experienced in running 15 independent schools in the UK, Switzerland and Qatar; with a highly-regarded education consultancy – Place Group - with experience in the state sector for efficiency of supply in setting up new schools and converting academies, along with driving value for money and compliance.

BPET operates seven Free Schools in London and Maidenhead, which opened between 2013 and 2015. All BPET schools are focused on delivering high quality provision in areas where there is a shortage of primary school places. We have ambitions for responsible growth in the future.

## 6.0 BPET's vision and ethos – *Learn, Enjoy, Succeed*

Our vision is to provide a high-quality education to all pupils regardless of culture, religion, background and circumstance. We are particularly keen to support disadvantaged children in achieving an education akin to what more privileged children would receive from the very best state and independent schools, and succeed in further/higher education and successful employment.

We believe that the attitudes, behaviours and a love of learning, together with a rigorous academic education in the core subjects, through a broad and balanced curriculum, provides the best approach for children to excel through their school and adult lives. This will be driven further by an extended day, with before, during and after school clubs, providing a breadth of opportunity to learn and experience a wide variety of subjects, beyond the national curriculum.

As set out in the BPET 3 Year Strategic Plan (201 - 2021), BPET has three strategic objectives which focus on:

- 1. Delivering a rich and balanced curriculum which develops pupils' independence and confidence to LEARN**
- 2. Providing an enriched learning experience where pupils ENJOY their learning, in a safe and happy environment - and can SUCCEED at a higher level than anyone might previously have thought possible**
- 3. Expanding BPET community, have best value for money across all BPET schools, by attracting and retaining the very best staff**

BPET Headteachers have agreed that these strategic objectives will also be the strategic objective of their School Development Plan, so the BPET Vision is being driven across the organisation.

As the sponsor, Bellevue Place Education Trust's function and responsibility is as the owner of the land and assets, as the employer for all staff and is the admissions authority for the schools. It is the Trust's role to provide the strategic framework across the academies within the Trust and ensure all statutory duties are met.

The Trust appoints an Accounting Officer, who is Mark Greatrex, Chief Executive of Bellevue Place Education Trust and is responsible for the running of the Trust.

## **7.0 Overview of the role of the BPET Board**

The BPET Board has the responsibility to:

- Establish the core education vision
- Hold Headteachers and LABs to account for the standards of attainment and broader achievement of pupils, the quality of teaching and learning, the behaviour and safety of pupils, the leadership and management of the school, the pedagogy, curriculum and learning environment for the children.
- Arrange for educational audits to evaluate performance regularly with cognisance of the latest OfSTED guidance and to make recommendations to improve effectiveness
- Set school targets (with input from LAB)
- Monitor and manage the financial and administrative policies (HR, ICT)
- Budgeting and reporting procedures
- Statutory compliance work
- Staff contracts and HR policies
- IT network strategy
- Major procurement policies
- Headteacher recruitment and appointment
- Evaluation of Headteacher performance (with input from LAB Chair)
- Administrative and support services as required
- Other educational programmes including but not limited to: leadership training, extended school programme.

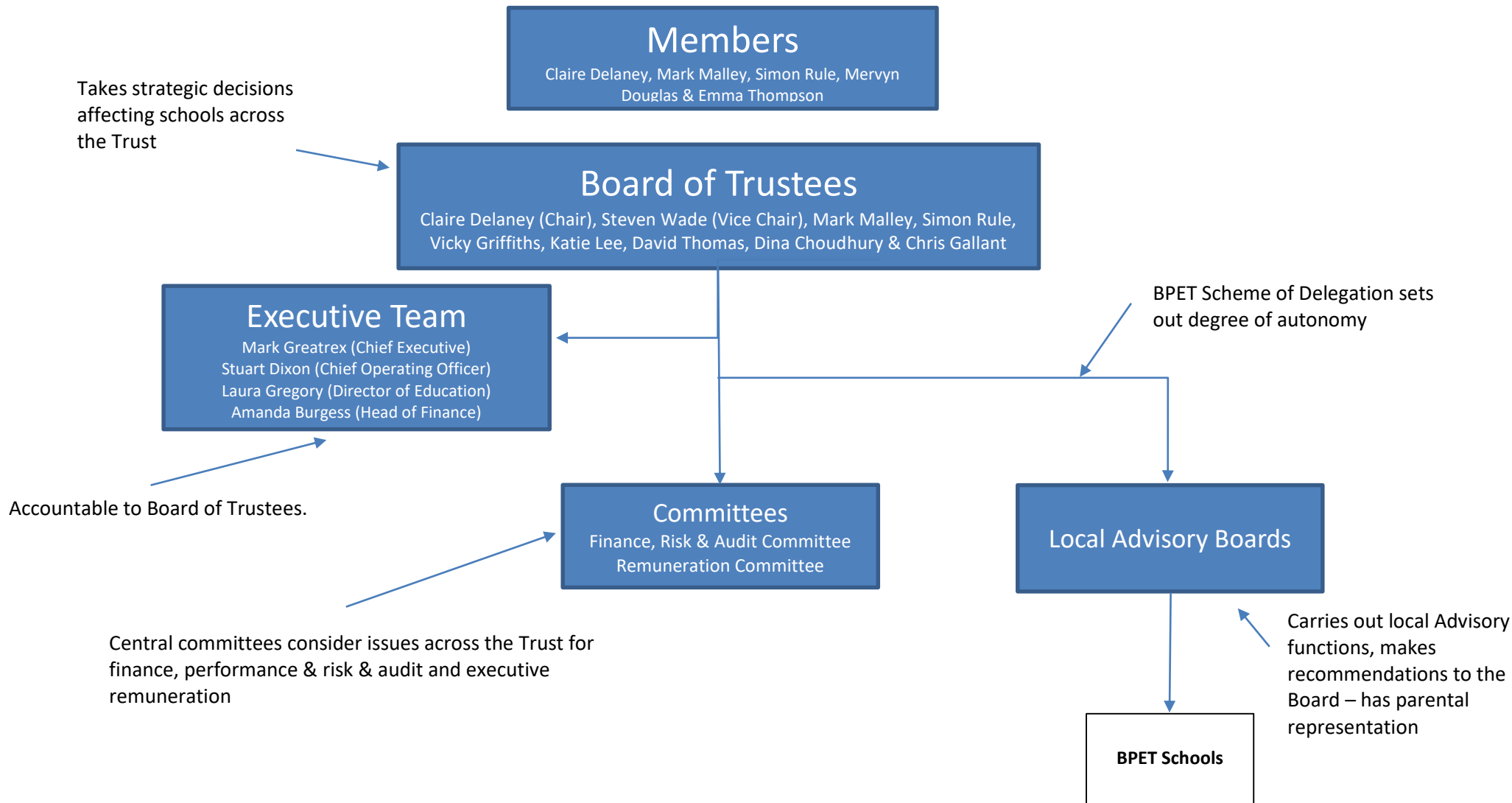
The Board can delegate responsibilities to Committee(s) of the Board. Currently the Board has established a Finance, Audit and Risk Committee and a Remuneration Committee.

To assist the Board in fulfilling its statutory responsibilities and ensuring the highest possible standards across the schools, the Board has appointed an Executive Team, known as the 'Central Trust Team', led by the Chief Executive. This team is responsible for carrying out functions on behalf of the BPET Board along with functions delegated to the Chief Executive in the BPET Scheme of Delegation.

The Trust has the role of appointing the Chair of Advisers. The remainder of the advisers are appointed by the Headteacher and Chair working together.

The following diagram sets out how this governance model sits across the Trust:

## BPET Governance Model



## 8.0 Overview of the Local Advisory Board's core function

Local advisers on the LABs are the strategic leaders for the BPET schools who play a vital role in making sure every child gets the best possible education. The LAB should have a strong focus on three strategic functions:

- Setting the vision, ethos and strategic direction for the school, within the overall vision of the Trust.
- Holding the Headteacher and senior leadership team to account for the educational performance of the school, its pupils and the performance management of staff; and
- Ensuring investment in educational improvement is value for money and having an impact.

The functions and responsibilities of the LAB are delegated through the BPET Scheme of Delegation. This includes areas that they will be responsible to recommend and be consulted upon.

This amounts to an interesting role for Advisory boards. The evidence suggests that those that deliver it well do so by:

- Understanding their strategic role
- Ensuring the local advisers have the necessary skills and commitment
- Appointing a Clerk to advise them on the nature of their functions
- Evaluating their performance annually

The Terms of Reference for a BPET LAB can be found in **Appendix B**.

To support their function, the LAB are recommended to agree a school visits protocol (an area model visits protocol is contained in **Appendix A**). In addition, LABs are asked to appoint individual local advisers to link roles, such as pupil premium and Special Educational Needs and Disability (SEND), or curriculum areas such as literacy or maths. An overview of these roles is contained in **Appendix F**.

It is important to note that the role of the LABs is to support and contribute to the success of the schools and not to do the school's job for them. If the local adviser does possess skills that the school wishes to utilise on a pro bono basis, then it is important that this is considered voluntary work and not part of a local adviser's remit. No local adviser should conduct paid work for the school unless approved in writing by the Chief Executive. (See section on Conflict of Interest.)

The most robust LABs welcome and thrive on having a sufficiently diverse range of viewpoints, such that an open debate leads to good decision-making in the interest of the whole school community.

The LAB should work to support and strengthen the leadership of the school and drive high standards that meets the needs of the local community. Local Advisory Boards should play a strategic role and avoid routine involvement in operational matters.

## 9.0 BPET Scheme of Delegation

As set out above, the BPET Board of Trustees is legally responsible for all BPET schools. It delegates a number of responsibilities to the LAB for each school.



The BPET Board has approved a BPET Scheme of Delegation, which sets out the formal delegation of responsibilities and accountabilities to the 1. Board; 2. Accounting Officer (Chief Executive); 3. Local Advisory Board; and 4. Headteacher.

The Scheme of Delegation is the guiding document in developing the Terms of Reference for the LAB.

### **Delegation Principles**

The principles underlying the allocation of responsibilities between the BPET Board and LAB:

- Autonomous schools, as set out within the vision of the Trust
- Budgets belong to schools and are approved by BPET Board
- The Trust's primary roles are to protect and develop the core vision for all schools maintained by Bellevue Place Education Trust and to ensure high standards of education and excellent leadership in all the schools
- Maximum focus in schools on good and outstanding teaching and learning: BPET's subsidiary role is to minimise the bureaucracy that has to be dealt with by schools
- BPET will therefore offer educational and operational support, through the Central Trust Team and compliantly procured contracts with high quality providers

The BPET Scheme of Delegation is published on the BPET website and all local advisers should be familiar with it. It can be found at [www.BPET.co.uk/about-usscheme-of-delegation](http://www.BPET.co.uk/about-usscheme-of-delegation)

### **10.0 Target setting**

It is the LAB's role to work with the Board to set the school's strategic targets, and to ensure all delegated statutory duties are met. The LAB should ensure that there is a robust strategy in place for achieving the vision of the school, addressing fundamental questions of 'where are we now?', 'where do we want to be?' and 'how are we going to get there?'

The strategy should provide a robust framework for setting priorities, creating accountability and monitoring progress in realising the school's vision. The strategy should include SMART<sup>1</sup> targets and key performance indicators (KPIs).

It is important to establish an annual observation cycle to provide a strategic overview of the school and ensure advisers get to know the school. The reports below are key documents, approved by local advisers to ensure the work of the school can be carried out efficiently. They are:

- School Development Plan and Self-Evaluation Form
- BPET School Improvement Review Cycle reports
- BPET Performance Reports
- Policies and procedures delegated to the school

A LAB must have good, timely data if it is to know the questions it needs to ask, to provide challenge, strengthen the school leadership and answer any questions asked of the LAB itself. In particular, the

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<sup>1</sup> Specific, Measurable, Attainable, Relevant and Timely.

LAB will need to see information relating to the priorities it has identified for improvement. This will include but may not be limited to, data on:

- Pupil learning and progress
- Pupil applications, admission, attendance and
- The quality of teaching

The LAB, not the Headteacher, should determine the scope and format of the Headteacher termly reports.

External data must be considered by the LAB, through the assessment of the school's performance and progress, and below is a list of sources that should be considered:

- OfSTED Reports
- DfE School performance tables
- ASP and other data sources like Fisher Family Trust or benchmarking reports

#### **11.0 Local Adviser School visits**

Local advisers need to know their school, if accountability is going to be robust and their vision for the school is to be achieved. With pre-arranged visits that have a clear focus, local advisers can see whether the school is implementing the policies and improvement plan they have signed-off and how these are working in practice. Visits also provide an opportunity to talk with pupils, staff and parents to gather their views.

#### **12.0 Ensuring investment in educational improvement is value for money and having an impact**

LABs have a key role in raising concerns about the way the schools spend public money to ensure value for money around the areas linked to educational improvement. This role is more like a whistle-blower role than budget monitoring. It requires local advisers to be aware of the following questions:

- Are we allocating our resources in line with our strategic priorities?
- Are we making full use of all our assets and efficient use of all our financial resources to ensure there is a good impact on educational improvement?
- How can we get better value for money regarding areas of educational improvement linked to our school development plan?

#### **Conflicts of Interest**

Local advisers must be aware of, sign up to, and follow the [BPET Conflicts of Interest Policy](#). This policy sets out any conflicts of interest with regard to finances and payment for services, but conflicts of interest may also arise where an individual's personal or family interests and/or loyalty conflict with those of the LAB.

All conflicts must be declared through the register of interests, which is completed at the beginning of every academic year and through an item at the beginning of every agenda. These must be

minuted and understood by all. **Appendix G** has the Declaration of Interest form all local advisers must complete and must be published on the school's website at the beginning of each academic year.

The LAB is required to publish up to date details of the structure of the LAB together with the names of their local advisers and their particular roles and responsibilities within the structure. In line with the requirement of the EFA Academies Financial Handbook, LABs are also required to publish the attendance record of all local advisers. This will all be contained in the school's annual Local Advisers' Review, published at the end of the academic year.

Also in line with stipulations of the EFA Academies Financial Handbook, the Trust must also record centrally and publish all the declarations of interest and the attendance record of members, trustees and local advisers. The Trust will request the information from the clerk.

## 12.0 LAB Self-evaluation

LABs should regularly evaluate their own effectiveness. This can be carried through a variety of means, throughout the academic year, which are:

- **Review LAB effectiveness** - The LAB should carry out a review of its effectiveness, completed and reviewed by the local advisers annually. A template form can be obtained from the Trust and this should be included in the Annual Local Advisers' Review.
- **Skills audit of LAB members** – Each LAB should conduct a skills audit of its advisers, so that training needs can be identified and the results can be considered when new local advisers are recruited. A template Skills Audit can be obtained from the Trust.
- **Performance review of the Chair** – The Chief Executive of Bellevue Place Education Trust will conduct a review discussion with the Chair annually, discussing the role, reviewing effectiveness of the LAB and considering what the Trust can do to support the Chair.
- **Chair to performance review each local Adviser** – The Chair should hold an informal discussion with each local adviser annually, discussing their role and contribution to the LABs effectiveness.

## 13.0 Support and training for local Advisers

LABs have a challenging role to perform. High quality induction and continual professional development is vital to equip local advisers with the skills that they need.

LABs are responsible for their own training requirements and these should be carried out throughout the year. Induction, continuous professional development and on-going training should be considered by the LAB, with the skills audit also identifying training needs. The clerk should keep a record of local adviser training undertaken throughout the year.

There are a number of training routes:

- Local Authorities provide a range of training programmes that the school will be able to buy into and this is quite often included in a Local Authority's support package for schools.

- If any training needs are identified, the Trust will be able to provide training for the LAB, as and when required, with the costs covered by the school (or schools).

The school will set aside a budget for local adviser training requirements (suggest around £1K).

Local Advisory Boards could consider giving the vice-chair or another local adviser a specific responsibility for ensuring every local adviser develops the skills that they need to be effective. The local adviser would be responsible for ensuring that every new and existing local adviser develop their skills to make an active and valuable contribution to the work of the LAB.

#### **14.0 Whistleblowing**

Whistleblowing arrangements are designed to respond to malpractice and wrongdoing. Local advisers should refer to the [BPET Whistleblowing Policy](#) before considering any action.

#### **15.0 Structure and membership of BPET Local Advisory Boards**

In keeping with the BPET vision of developing autonomous schools, there is extensive local choice about the structure, size and operation of each LAB. The following decisions set the limits on this local choice:

- The LAB must operate within the BPET structure, and must remain within the overall vision, ethos and strategic direction of the Trust
- The Chair of each LAB is appointed by the BPET Board, serving at the pleasure of the Board
- The Chair and Headteacher together use a skills-based approach to appointing the local advisers, each to serve for a four-year term.
- There must be a minimum of two parent advisers, but there is no maximum
- The suggested size of a LAB is 6-10

All local adviser appointments will be informed by the skills audit, which will be annually conducted by the LAB

##### Terms of Office

A local adviser's term of office is 4 years and no local adviser will be expected to serve more than two terms

##### Chair

The Chair serves at the invitation of the Trust Board for two-year term of office, renewable up to a maximum of 4 x 2-year terms. The process for considering re-appointment as Chair to include a formal review with the BPET Chief Executive.

##### Sub-Committees

LABs to have the flexibility to organise their own business as best suits each school, including time, place, frequency of meetings; appointment of committees and working groups; appointment of link members; organisation of school visits; subject to there being at least one meeting of the LAB every long term called and recorded by a clerk.

#### Other Local Adviser roles to be appointed

A LAB is encouraged to operate a link adviser system, providing a focus, for the following roles:

- **Pupil Premium**
- **SEND**

An overview of these roles can be found in **Appendix F**.

#### Clerk

Each LAB is required to appoint a clerk to manage the running of the LAB and provide the following services:

- Convene meetings and maintain attendance records
- Take and distribute termly LAB meeting minutes, following up actions as required
- Offer procedural advice and guidance during and between meetings

#### Strategic Advisers' Calendar

With a number of functions for the Advisory board to undertake, LABs should consider establishing an annual advisers' calendar. This will not only ensure that all the business is conducted through the academic year, but also enable school leaders to provide information in a timely manner.

#### Advisory boards' relationship with school leaders

The relationship between a LAB, particularly the Chair of Advisers, and the Headteacher is crucial to effective governance. They should work in close partnership, but retain sufficient distance to allow the Headteacher to run the school and the LAB to hold them to account.

### **16.0 Local Adviser Expenses**

Local advisers are entitled to claim for reasonable expenses incurred during their performance of duties on behalf of the school. The BPET Expenses Policy (Trustees and Local Advisers) can be found at [www.BPET.co.uk/about-us/policies-and-procedures/](http://www.BPET.co.uk/about-us/policies-and-procedures/)

## Appendix A

### Code of Conduct for the BPET Local Advisory Board

The following document provides a statement of the broad principles by which the local advisers of the schools within BPET should operate.

#### 1.0 General

The Headteacher is responsible for the day-to-day management of the school, the implementation of policy and the operation of the curriculum. Local advisers have a responsibility for monitoring and keeping under review, the policies, development plan and procedures within which the school operates.

The main aim of the school is to raise the educational achievement of all its pupils, following the vision and ethos of Bellevue Place Education Trust.

The Advisory board will contribute most effectively to this aim by focusing on its three roles:

- Setting the vision, ethos and strategic direction for the school, within the overall vision of the Trust.
- Holding the Headteacher and senior leadership team to account for the educational performance of the school, its pupils and the performance management of staff; and
- Ensuring investment in educational improvement is value for money and having an impact

All local advisers have equal status; their central concern is the success of the school as a whole. Local advisers have a general duty to act fairly and without prejudice at all times.

Local advisers should consider carefully how their own decision might affect other schools both within and outside BPET. Local advisers should encourage open government and should be seen to do so. All local advisers are required to act in accordance with the Nolan principles as follows:

**Selflessness** – Holders of public office should act solely in terms of the public interest. They should not do so in order to gain financial or other benefits for themselves, their family or their friends.

**Integrity** – Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might seek to influence them in the performance of their official duties.

**Objectivity** – In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards and benefits, holders of public office should make choices on merit.

**Accountability** – Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.

**Openness** – Holders of public office should be as open as possible about all the decisions and actions they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands.

**Honesty** – Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.

**Leadership** – Holders of public office should promote and support these principles by leadership and example.

Local advisers do not act alone but as members of a corporate team. Individual local advisers have power only when it is delegated specifically to them by the whole Advisory board.

## **2.0 Commitment**

Being a local adviser involves a fair amount of time and energy. Careful regard should be paid to this when agreeing to serve or to continue to serve on the advisory board of a school.

The advisory board is required to meet at least four times per academic year and it is imperative that all local advisers attend the meetings. All local advisers should involve themselves actively in the work of the Advisory board and accept a fair share of the responsibilities, including service on committees (if any) and accepting link roles.

Local advisers should know the school well and take opportunities to visit it and become involved in school activities.

### **Relationships**

Local advisers should strive to operate as a team in which constructive working relationships are actively promoted. Local advisers should develop effective working relationships with the Headteacher, staff, parents, other relevant agencies and the local community.

### **Confidentiality**

Local advisers must observe complete confidentiality when asked to do so by the advisory board, especially in relation to matters concerning individual staff, pupils or parents.

Although decisions reached at local advisers' meetings are normally made public through the minutes, the discussions on which decisions are based should be regarded as confidential. Any decisions made, whether or not supported individually by you as a local adviser, should always be actively supported once the Advisory board has made the decision collectively.

Local advisers should exercise the highest degree of prudence when discussion of potentially contentious issues arises outside the advisory board.

### **Conduct**

Local advisers should express their views openly within meetings but accept collective responsibility for all decisions, supporting those decisions at all times in public forums.

Local advisers should only speak or act on behalf of the Advisory board when they have been specifically asked to do so.

All visits to school should be undertaken within a framework, which has been established by the Trust and agreed with the Headteacher.

In responding to criticism or complaints relating to the school, local advisers should refer to the Trust's 'Complaints Procedure' for the correct procedure to be followed and advise the complainant accordingly.

Local advisers have a responsibility to maintain and develop the ethos and reputation of the school. Their actions within the school community and externally should reflect this.

Any pecuniary interest that a local adviser may have in connection with the advisory board's business must be recorded in the register of pecuniary interests. Where an interest is declared, the local adviser must leave the meeting while the item is under discussion.

### **Training and Development**

Local adviser training and development is important. It benefits the school and individual local advisers, and can help to develop effective teamwork. Local advisers are encouraged to undertake training to further their individual interests within the LAB and the work of the LAB as a whole.

### **Mentoring**

An experienced local adviser who acts as a mentor to new local advisers can provide support and a listening ear for all aspects of the work of the advisory board.

### **Meetings**

Individual local advisers do not have any authority in school. It is the collective decisions of all the local advisers together that carry authority. The activities that local advisers undertake outside meetings can be seen as preparation for the times when the advisory board 'goes live' - in a meeting.

It follows that if a LAB is to carry out its functions well, its meetings are crucial. Below is BPET's 'Meetings Charter'. If all the local advisers and the Clerk subscribe to, and implement, the charter, the LAB will be giving itself the best chance of coming to informed, collective decisions.

### **Meetings Charter**

As a local adviser we expect:

- people to attend regularly and be punctual;
- an agenda and relevant documents to reach me at least seven days before the meeting;
- an agenda that makes clear the purpose of each item;
- a Chair who keeps to the agenda, paces the meeting so that time is given to each matter in proportion to its importance, draws on all members for contributions and keeps discussions to the point;
- my contributions to be heard and others to contribute to the discussion;
- the decision-making process to be quite clear;
- local advisers to work together and not to be stubbornly partisan;
- local advisers to take collective responsibility for decisions;
- minutes that summarise views succinctly, record decisions accurately and are made available, in draft form, soon after each meeting
- if I am a parent adviser, that my focus remains on the implementation of policy in the school, ensuring my views are not influenced by my child, their teacher or their class.

Others can expect me to:

- attend regularly and be punctual;



- read the agenda, minutes and other papers before the meeting and note items I want to say something about;
- bring my papers to the meeting;
- make relevant and positive contributions;
- listen to and consider what other people want to say;
- accept my share of collective responsibility, even for those decisions that I do not personally agree with.

### Visiting the School

Local advisers do not have an automatic right to enter the school. However, they do need to have the opportunity to arrange visits to the school in order to see schools' policies in action and to understand how the school works.

In order to avoid misunderstandings arising, every Advisory board is required to abide by the following principles:

- All local advisers should visit the school.
- The total number of visits per term should be agreed in advance with the Headteacher. Too many visits can be disruptive to pupils' learning.
- The date and timing of a visit should be arranged in advance with the Headteacher and other staff involved.
- Visits should have a clear focus, linked to a school policy, a curriculum area or an aspect of the school development plan.
- If a local adviser is going to spend time in a classroom, this should be discussed with the class teacher so that both are clear how long the local adviser is coming for, what they are going to look at and what they are going to do.
- Local advisers should understand that their visits do not replace professional inspections or the monitoring role of the Headteacher. Local advisers should not make judgements about the effectiveness of the teaching that they see.
- If local advisers are concerned about any aspects of what they have seen this should be discussed with the Headteacher.
- After the visit, the local adviser should report back, in writing to the Advisory board. A written report should be discussed with the Headteacher before publication.

### Monitoring the Performance of the Advisory Board

BPET will monitor the performance of all local Advisory boards through the KPIs outlined below:

Key Performance Indicator	Evidenced by	Frequency of Checks
The Advisory board ensures that the school provides a curriculum that is balanced and broadly based.	<ul style="list-style-type: none"> <li>- Local adviser visits.</li> <li>- BPET Review Cycle</li> <li>- Ofsted.</li> </ul>	Annually
The Advisory board monitors staff and pupil discipline, including pupil attendance.	<ul style="list-style-type: none"> <li>- Termly report received from Headteacher and Performance Committee.</li> </ul>	Termly Annually

	<ul style="list-style-type: none"> <li>- Annual review of performance and behaviour policies.</li> </ul>	
The Advisory board ensures key elements of strategy are communicated.	<ul style="list-style-type: none"> <li>- Local adviser input into School Development Plan.</li> </ul>	Bi-annually
The Advisory board receives timely and detailed reports	<ul style="list-style-type: none"> <li>- Standard agenda items at full Advisory board meetings to receive relevant reports.</li> </ul>	Termly
The Advisory board holds at least 3 meetings per year with full attendance at all meetings.	<ul style="list-style-type: none"> <li>- Attendance recorded by Clerk.</li> <li>- Annual meeting plan developed and agreed in autumn term.</li> </ul>	Termly Annually

## **Appendix B - BPET Local Advisory board: Terms of Reference**

LAB Purpose
<ul style="list-style-type: none"> <li>To support the Trust's Vision of encouraging successful autonomous schools within the BPET family</li> <li>To make recommendations to the Trustees about the ethos, vision and strategic direction of the school</li> <li>To fulfil the requirement for each school to have local governance arrangements, and to be invited to meet Ofsted inspectors and other official visitors to the school</li> <li>To promote high standards of educational attainment and achievement at the school</li> <li>To act as a critical friend to the staff, providing both challenge and support</li> <li>To assist the school in meeting the needs of the local community it serves</li> <li>For certain matters listed below, a requirement to be consulted by the Headteacher and/or Trustees before important decisions are made</li> <li>On all other matters, to be consulted at the discretion of the Headteacher and/or Trustees</li> </ul>
LAB Membership
<ul style="list-style-type: none"> <li>Local Advisory Boards to have 6-10 members (see role description below)</li> <li>The Chair of the LAB to serve at the invitation of the Trustees</li> <li>At least 2 members to be parents of children in the school</li> <li>Chair &amp; Head to use a skills-based approach to invite members to serve on the LAB</li> <li>Members to serve for a 4-year term</li> <li>Local discretion to include staff members, and to organise elections where appropriate</li> </ul>
LAB Meetings
<ul style="list-style-type: none"> <li>LABs to have the flexibility to organise their own business as best suits each school, including time, place, frequency of meetings; appointment of committees and working groups; appointment of link members; organisation of school visits; subject to there being at least one meeting of the LAB every long term called and recorded by a clerk</li> </ul>
Open Meetings
<ul style="list-style-type: none"> <li>A requirement to hold "open" meetings for contentious or controversial issues of broad interest to the school community</li> </ul>
Consultation with LAB required for
<ul style="list-style-type: none"> <li>Proposals to change the location, size, character or ethos of the school</li> <li>Revisions to the School Development Plan</li> </ul>
Discretionary Consultation with LAB (an illustrative list of proposals which may be discussed with the LAB before a decision is taken)
<ul style="list-style-type: none"> <li>To propose setting up a task and finish group to develop ideas for engaging with the community</li> <li>To undertake a programme off-site school visits, such as international travel or residential trips</li> <li>To develop a programme of activities before or after the school day such as breakfast clubs or afterschool clubs</li> </ul>

### **Administration principles for the LAB**

The Agenda will be prepared in advance, in consultation with the Headteacher and the Chair. Local advisers must advise the clerk of any items for inclusion 10 working days before a meeting. Agendas and relevant papers will be circulated 5 working days before each meeting.

Draft minutes will be sent to the Chair for checking 5 working days after a meeting, so that they can be circulated to the advisory board within 10 working days. Minutes will be kept electronically and in hard copy at the school (in an advisers' folder) and copied to the Central Trust Team.

### **Appendix C – Role Description for Member of a Local Advisory Board**

<b>Role title</b>	Member of a Local Advisory Board
<b>Location</b>	Local Advisory Board meetings to be held at the relevant school
<b>Hours</b>	<ul style="list-style-type: none"> <li>▪ Minimum of four Local Advisory Board meetings a year</li> <li>▪ Two visits to school a year</li> <li>▪ Induction training, depending on your knowledge and experience</li> <li>▪ Reading time - reports and documentation prior to meetings, newsletters and information between meetings</li> </ul>
<b>Salary range</b>	Voluntary; out of pocket expenses are paid
<b>Term of office</b>	Four years
<b>Purpose of the role</b>	The Local Advisory Board plays an active part in supporting the head, liaising as appropriate with the BPET Board, ensuring that there is robust oversight of the school and its leadership.
<b>Appointed by</b>	Appointments to the Local Advisory Board will be made by the Chair and Headteacher, with the Chair appointment to be made by the BPET Board.

#### **The trust's purpose - Learn, Enjoy, Succeed**

**The trust's vision** - BPET vision is to run autonomous schools, with support for back office support, with freedom over the educational delivery, within the vision of the Trust. The aspiration is that to maintain schools where academic excellence is just one aspect of an outstanding education. With a rich extended curriculum, building emotional intelligence in pupils, through the learning experience, typically nurtured from pupils' interest of ideas.

#### **Specific responsibilities**

The specific functions of the members of the Local Advisory Board are as follows:

- To monitor the implementation of the strategic vision of the trust and the school.
- To build an understanding of how the school's budget and staffing structure enables the BPET and school's vision to be delivered.
- To build an understanding of how the progress and attainment of pupils is measured.
- To develop communications up and down the BPET governance structure, in particular:
  - Provide a point of contact for parents, carers and other members of the local community.
  - Develop links with the wider community which can feed into the trust's understanding of the school's context.
  - Use local links and networks to promote collaboration and to champion the work of the trust.
- To provide advice and feedback to the BPET Board.

In addition, LAB members may be asked to sit on panels reviewing decisions made by the Headteacher in relation to pupil exclusion, and to hear formal complaints. Specific training will be provided for these roles.

## Appendix D - Local Advisory Body – sample meeting agenda

Example of a Local Advisory Board Agenda				
	Item	Lead	Papers	Time
1	<b>Welcome</b> To make introductions and to start to build the team	Chair		20 mins
2	<b>Attendance</b> - To note apologies	Chair		
3	<b>Declarations of Interest</b> - To note	Chair		
4	<b>Appointment of chair</b> 1. To note the decision of the trustees to appoint xxx as chair of the xxx Local Advisory Board	Clerk		
5	<b>Other Business</b> 1. To discuss developing the LAB training plan	Chair	Training plan	
6	<b>Head of School's Report</b> To include: 1. Progress on delivering the SDP to date: a. Contextual details b. Summary of exam results c. Targets for academic year d. Briefing on the improvement cycle, and the role of the SEF and the SDP 2. Consultation on proposed changes to the SDP	Headteacher	Termly report	60 mins
7	<b>LAB Monitoring</b> 1. To approve Policy for LAB Visits 2. To agree focus for spring term visits	Chair	Policy for LAB Visits	15 mins
8	<b>Task and Finish Group</b> To propose setting up a task and finish group to develop ideas for engaging with the community	School to Lead		5 mins
9	<b>Meeting Dates</b> To note meeting plan	Clerk	Meeting Plan	5 mins
10	<b>School Events</b> List of events LAB members may want to attend e.g. Christmas concert etc.	Headteacher		

## Appendix E - Local Advisory Body – suggested annual programme

Example Annual Plan for a Local Advisory Board			
Autumn 1 (early Sept)	Autumn 2 (late in term)	Spring (mid-term)	Summer (late in term)
<b>Business:</b> Note LAB membership and chair Sign code of conduct Declare conflicts Confirm minutes	<b>Business:</b> Declare conflicts Confirm minutes	<b>Business:</b> Declare conflicts Confirm minutes	<b>Business:</b> Declare conflicts Confirm minutes
<b>Consultation:</b> HT report on: Initial analysis of public examination results against targets Update on operational matters (staffing, premises etc.) Confirm strategy for achieving the vision	<b>Consultation:</b> HT report on: Benchmarked validated performance data against national and local figures Progress towards meeting targets/KPIs, Budget (outline only)	<b>Consultation:</b> HT report on: Mid-year progress towards meeting targets Budget (outline only)	<b>Consultation:</b> HT report on: End year progress Review of strategy and if it supports the achievement of the vision Propose targets/KPIs for following year(s) How outline budget and staffing will support strategy
<b>Monitoring:</b> Determine which aspects of improvement strategy the LAB will monitor and how, including the areas LAB members will focus on for their visits.	<b>Monitoring:</b> LAB members to report on monitoring visits	<b>Monitoring:</b> LAB members to report on monitoring visits	<b>Monitoring:</b> LAB members to review monitoring arrangements and their effectiveness and to begin thinking about strategy for the following year
<b>Community:</b> Determine how the LAB will interface with the school and agree plan for the year	<b>Community:</b> Report on community engagement	<b>Community:</b> Report on community engagement	<b>Community:</b> Review community engagement and effectiveness, plan strategy for following year
<b>Training and CPD:</b> Identify training needs and plan delivery.	Training and CPD ongoing  Plan annual meeting with BPET Board for thanks and acknowledgements and information sharing.		

## **Appendix F - Overview of Local Adviser Roles**

### **1. Pupil Premium Local Adviser**

The pupil premium is a grant given to schools to close the attainment gap between disadvantaged pupils and their peers, and to support pupils with parents in the armed forces.

Schools can [spend the grant as they see fit](#), if it is to demonstrably improve the attainment of eligible pupils. Schools do not need to spend an equal amount on each pupil, or fund interventions that benefit only eligible pupils. Schools must publish pupil premium strategy on their website setting out:

- The amount of the school's pupil premium allocation
- The main barriers to educational achievement faced by eligible pupils, how the grant will be spent to address these barriers, the reasons for this approach and how impact will be measured
- The date of the school's next review of its pupil premium strategy

The role of the pupil premium local adviser is to support the school in developing and evaluating the pupil premium plan, using an evidence base to drive achievement in this identified group of pupils. This local adviser will report back to the LAB on a termly basis, the gap closed and revised plan.

### **2. The Role of the Special Educational Needs and Disability (SEND) Local Adviser**

The LAB should appoint a SEND local adviser to make sure pupils with SEND receive the help they need to access the curriculum and to participate fully in the life of the School. As a SEND local adviser, you are the link between the LAB and the School in relation to pupils with SEND. It is your role to help raise awareness of SEN issues at LAB meetings and give up-to-date information on SEN provision within the School. You also help review the School's policy on provision for pupils with SEN and ensure that parents have confidence in this provision.

There is certain basic information that every SEND local adviser should know:

- How the School identifies children with SEND - make sure you understand how the School identifies a pupil with SEND and what happens once a pupil has been identified;
- How SEND money is spent - understand how your Headteacher and LAB decide how the allocated income for SEND is spent for all pupils with SEND in your School;
- The School's SEND policy - you should know your School's policy on SEND and be responsible for ensuring it is reviewed regularly. Regular reviews are vital to ensure that the SEND provision reflects the changing needs of the School, its circumstances, and the law; and
- Develop good relationships in the School - developing good relationships with the key people involved in the School is essential. It is particularly important to get to know the Headteacher and the SEND Co-ordinator ("SENCO").

#### **Good Practice Checklist**

- Arrange class visits with the Headteacher/SENCO to gain an understanding of how your School delivers SEND provision.
- Set up regular meetings with the SENCO.
- Take a central role in discussions about SEND.
- Visit the School as often as you need to, stay informed and attend training for SEND local advisers.
- Find out what links your School has with other local schools, SEND support services and parents.
- The SENCO will also be able to suggest information packs that can be ordered to provide a full description of the information required to complete the role.

The SEN local adviser should report to the Advisory Board once a year on provision for SEN.

**Appendix G**

**Declaration of Pecuniary and Personal Interest Form**

**Name:** \_\_\_\_\_

**School/Trust:** \_\_\_\_\_

**Position:** \_\_\_\_\_

I declare as a Local Adviser/ of \_\_\_\_\_ School] that I hold the following personal and/or pecuniary interest(s):

<b>Pecuniary interests</b>	<b>Please provide details of the interest</b>
Current employment	
Businesses (of which I am a partner or sole proprietor)	
Company directorships – details of all companies of which I am a director	
Charity trusteeships – details of all companies of which I am a trustee	
Membership of professional bodies, membership organisations, public bodies or special interest groups of which I am a member and have a position of general control or management	
Gifts or hospitality offered to you by external bodies while acting in your position as a local adviser/trustee and whether this was declined or accepted in the last 12 months	
Contracts offered by you for the supply of goods and/or services to the trust/school	
Any other conflict	



Personal interests	Name	Relationship to me	Organisation	Nature of the interest
Immediate family/close connections to local adviser/trustee				
Company directorships or trusteeships of family/close connections to local adviser/trustee				

**If you are a local adviser or trustee of any other schools and/or academies, please provide details below:**

**Name of school/academy:**

**Position held:**

**Date appointed/elected to post:**

**Date of termination to post:**

To the best of my knowledge the information supplied above is correct and complete. I understand that it is my responsibility to declare any conflict of interest/loyalty, business or personal that relates directly or indirectly, to myself or any relation in any contract, proposed contract or other matter when present at a meeting at the school where such contract or matter comes under consideration. I understand that I must withdraw from any meeting during the discussion of such contract or matter and must not vote in respect of it.

I agree to review and update this declaration annually and give consent for the information provided to be used in accordance with the BPET Conflicts of Interest Policy.

**Signed:**

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**Date:**

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