

## **Skegness**

### **Theme 14: Formation of a new cluster**

### **Theme 15: Creation of a new SBM role**

The Greenwood Academies Trust has a Secondary Academy and 4 infant / junior academies located in the Skegness area. On taking these academies into our Trust it became clear that the financial management expectations of them, in terms of the breadth of the finance administrator role, was significantly increased compared to their position prior to academy conversion. It was therefore clear that an alternative approach to the administration of finance at these academies should be considered.

Due to the close physical location of this cluster of academies, and as a consequence of the academies being managed by the same Executive Principal, there was a high degree of cooperation and information-sharing across the cluster. In order for pupils to have the most seamless transition between infant, junior and secondary phases, these academies were already operating under a mind-set of a cohesive cluster within the Trust. This background improved the chance of success for a single finance function for the cluster.

The key priorities for the Cluster SBM role were to:

- enhance the learning and development opportunities for the finance staff in each infant / junior / primary academy,
- improve the consistency of financial output from each of the academies and the consistent implementation of Trust processes,
- reduce the number of individual academy finance teams for the Central Finance function to manage

It was hoped this could be achieved by co-locating the infant / junior / primary finance administrators at the Secondary Academy, reporting to the SBM for the cluster.

It was considered whether this could be achieved by keeping the staff within their existing primary locations, however it was decided the full gains of the SBM role and the achievement of the above priorities could not be realised in this way. As a result the finance administrators were co-located with the SBM on the Secondary Academy site. These staff now all share the same office. This introduced some other logistical issues, including:

- finding suitable office space at the Secondary Academy
- removal and storage of all relevant historical financial records
- identification of the tasks currently performed by the finance administrators that would now need to be covered by other staff at the infant / junior / primary academy (these were the tasks that required the physical presence of the staff member).

Once identified, these tasks then needed to be transitioned to an alternative member of staff.

It is clear that the aims and objectives of forming the cluster have been realised. The key impacts for the Trust have been:

- improved consistency of application of financial processes across the cluster
- reduced overhead for the Central Finance team, since most queries are now resolved by the SBM at the cluster location
- improved service to Infant / Junior / Primary Principals. These Principals now have the SBM as their key contact and benefit from engaging with this more experienced Finance staff member. They consider their queries to be resolved much more quickly than historically, and have a greater amount of confidence in the service they are receiving, and confidence that their financial position is clearly understood and managed effectively
- improved training and development opportunities for the finance administrators, who have immediate access to the SBM within the same office. This has improved their financial capability.

The key learning points that have been taken are as follows and provide key hints and tips for other schools:

- planning is key – ensure plenty of time for consultation and planning
- think about the role of engagement – ensure full engagement with Academy Principals and other impacted parties
- use a phased approach – consider a phased approach to make the transition easier
- think about work allocation – allow enough time to consider how the work in the newly-formed cluster is best allocated, not only to take advantage of efficiencies but also to ensure appropriate opportunities for staff development.