



LEARNING TRUST

**Bespoke transition support for new MAT CEOs,
Executive Heads and those new to Academy Trust
leadership and governance.**

Are you about to take the helm at an Academy or Multi Academy Trust for the first time in your career and would you like some support to transition into the role?

Becoming a leader or director of an Academy or a MAT involves a steep learning curve in all aspects related to the business of running schools, markedly different to leading a school as an educationalist. Trusts operate in a minefield of compliance requirements in accordance with educational, tax, charity and employment law and much more. Trust CEO, Jodie Croft, can help you work your way carefully through.

Jodie Croft is the founding CEO of the GEMS Learning Trust and has been operationally hands on since day one. She now leads a MAT with two brand new primary schools and a third set to open in the near future. Prior to establishing the GEMS Learning Trust, Jodie set up a secondary school in Suffolk after a 10-year career of leadership and teaching in state schools in the UK. She also provided consultancy to the Maiden Erlegh Trust and DebateMate, resulting in approved free school applications.

Jodie can provide tailored guidance and practical support with any of the dimensions set out below.

The Trust charges £550 per day and £280 for half a day in person, or £80 per hour for a telephone/FaceTime discussion. Jodie can meet you in a mutually convenient location.

- Bidding for new schools- free schools/academy presumptions
- Project managing the opening of new schools
- Setting up consultations and writing statutory consultation reports
- Companies House responsibilities
- Understanding MAT Articles
- Academies Financial Handbook – Trust- wide application
- Trust-wide policy development
- External and internal audit processes across a trust
- LGPS and TPS administration
- Long-term sublets to maximise income
- The Trust's role in obtaining planning permission for buildings
- Trust-wide marketing strategies
- Trust-wide risk management / risk registers
- Governance structures/directors' roles
- Governance committee remits/schemes of delegation
- Trust-wide communication strategies
- Trust website development
- Monitoring Trust finances
- Designing employment contracts for Trust staff
- Working with Trust members/AGMS
- Trust-wide procurement
- Annual cycles of governance, monitoring and reporting to the board
- Pupil place-planning strategies
- Support with CEO/Exec head job applications and interviews
- Getting ready for GDPR in a Trust

BOOKING FORM

Please complete the form below and return to gemslearningtrust@gemseducation.com

Preferred date/time _____ Length of session _____

Cost of session _____

Agreed location _____

What would you like to focus on in your session?

Please use the tick box below to identify each area you would like to focus on.

- | | |
|--|---|
| <input type="checkbox"/> Bidding for new schools- free schools/academy presumptions | <input type="checkbox"/> Governance structures/directors' roles |
| <input type="checkbox"/> Project managing the opening of new schools | <input type="checkbox"/> Governance committee remits/schemes of delegation |
| <input type="checkbox"/> Setting up consultations and writing statutory consultation reports | <input type="checkbox"/> Trust-wide communication strategies |
| <input type="checkbox"/> Companies House responsibilities | <input type="checkbox"/> Trust website development |
| <input type="checkbox"/> Understanding MAT Articles | <input type="checkbox"/> Monitoring Trust finances |
| <input type="checkbox"/> Academies Financial Handbook - Trust-wide application | <input type="checkbox"/> Designing employment contracts for Trust staff |
| <input type="checkbox"/> Trust-wide policy development | <input type="checkbox"/> Working with Trust members/AGMS |
| <input type="checkbox"/> External and internal audit processes across a trust | <input type="checkbox"/> Trust-wide procurement |
| <input type="checkbox"/> LGPS and TPS administration | <input type="checkbox"/> Annual cycles of governance, monitoring and reporting to the board |
| <input type="checkbox"/> Long-term sublets to maximise income | <input type="checkbox"/> Pupil place-planning strategies |
| <input type="checkbox"/> The Trust's role in obtaining planning permission for buildings | <input type="checkbox"/> Support with CEO/Exec head job applications and interviews |
| <input type="checkbox"/> Trust-wide marketing strategies | <input type="checkbox"/> Getting ready for GDPR in a Trust |
| <input type="checkbox"/> Trust-wide risk management / risk registers | |

Please outline any further specific areas you would like to explore.

Signed _____ Print name _____

Email address _____ Telephone no. _____

Invoice address _____

_____ Post code _____

TERMS AND CONDITIONS

1. The minimum charge per hourly session is £80. If the session overruns, additional charges may apply.
2. A half day rate is £280 for 3.5 hours.
3. A day rate is £550 and consists of 7 hours.
4. The GEMS Learning Trust is not VAT registered and VAT is not currently charged.
5. Invoices must be settled within 15 days of receipt.
6. Charges are exclusive of travel expenses which must be reimbursed in full. All efforts will be made to keep travel costs to a minimum and costs will be mutually agreed in advance.
7. The location of each session must be mutually agreed.
8. If you are unable to make a confirmed session, we ask that you let Jodie know at least 24 hours in advance, if travel has already been paid for you are liable for the costs of any pre-booked travel expenses.
9. If you fail to give any notice for cancellation you are liable for the full cost of the session.
10. In order to get the most out of each session, we will ask you to complete a short questionnaire on our booking form which will help to clarify your goals.
11. We ask that you return the booking form in advance to confirm your acceptance of our terms and conditions.