

# Academy group successfully opens free schools with robust yet agile finance solution



## School Profile

### Name

Rutherford House School

### School Category

Academy free school

### School type

Primary

### Pupil roll

56\*

### Age range of pupils

4 to 11

### LA

Wandsworth, London

## Bellevue Place Education Trust (BPET) is the partnership of Bellevue Education and Place Group.

BPET opened its first free school, Rutherford House School, in September 2013. This was followed in 2014 by Braywick Court School and Whitehall Park School.

BPET now operates three state-funded, academy free schools and has government approval to open a further four in September 2015.

Through being part of a group, BPET schools benefit from shared best practice with UK independent schools and a focused training programme covering all aspects of education.

## The school's objectives

The plan for a free school in Balham, Rutherford House, was in response to the huge demand in the area for primary school education. After twelve providers submitted a bid to open a school on the site Bellevue Place Education Trust, supported by financial expertise from School Business Services (SBS), won the tender process. The project management then began for the opening of the Rutherford House.

Rutherford House is unashamedly focused on high academic attainment, and employs innovative pedagogical approaches delivered by the finest teaching staff. In order to achieve this it was crucial that the school implemented a strong yet agile financial structure.

## How SBS services helped

School Business Services has supported BPET since 2012 by providing the trust with a bespoke financial solution to underpin its growing needs from the initial application phase, continuing through to post-opening and beyond.

During the initial feasibility and planning stage for all three new schools SBS supported the trust to build and develop a number of financial models, looking at different admission and staffing scenarios. By stress testing the application, SBS ensured each school would remain financially viable in the longer term using benchmarking data and financial ratios.

Once the initial Rutherford House application was approved by the DfE, SBS actively supported the management of the trust's pre-opening grant to ensure that funds were effectively used to successfully open the new school on time and within budget. The SBS team provided key financial expertise including:

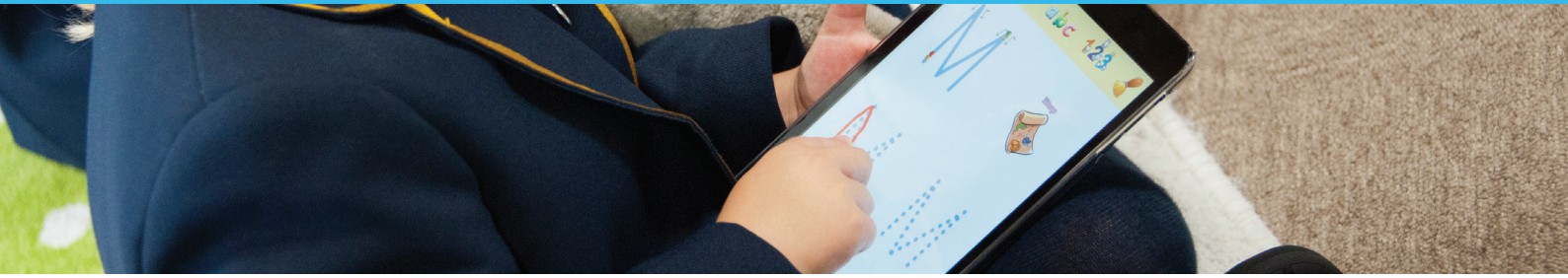
- Procurement of service contracts ensuring best value
- Recruitment of key school staff
- Accounts system procurement, implementation and setup
- Bank account management including cash flow and bank reconciliation

Since the opening of Rutherford House in 2013 a full school business manager service was and continues to be provided, averaging two days support each week across all three schools.

“In setting up a new school we were not always certain what was expected next. But with the flexibility in our finance solution with School Business Services we knew we had expert support when we needed it”

Gina Thomson  
Headteacher





## The support includes:

- Ensuring BPET compliance with the requirements placed on new academies by the DfE and EFA
- Setting up financial procedures and implementing Civica Resource 3200 across the trust
- Processing of all financial transactions
- Budget planning using SBS Online management tool ([www.sbsonline.org.uk](http://www.sbsonline.org.uk))
- Preparing year-end company accounts for trust
- Payroll and HR functions

A major capital programme to refurbish the building occupied by the school brought in substantial additional funding. School business services managed the grant claims of over £5M, payments to developers and VAT claims in relation to this work.

The vision and goals of the school proposers are vitally important, but they are not enough. One of the biggest challenges is combining every element necessary to make the vision a reality. SBS provided the expert education sector knowledge and support to ensure it was a success.

There are regular visits to the school and meetings with staff and governors, but with finance systems hosted in a cloud server the SBS team is able to be on call all week from any location. To customers and suppliers the school appears to have a full-time School Business Manager without the salary expenditure.

## The impact

SBS has supported the trust from day one adapting the service and support to what is required at that time and phase, providing flexible, knowledgeable support and resources where they are needed most.

The senior finance consultant provided key financial expertise that ranges from managing the day to day finances to providing a strategic input into forward planning the schools development. This has been important due to increased cost pressures and financial complexities of education funding and the need to maximise the limited budgets available to a new a school.

This ensured that the headteachers, governing body, teachers and support staff were free to focus on Teaching and Learning and the education and well-being of Rutherford House, Braywick Court and Whitehall Park pupils.

Expert advice has meant that the governors and senior leadership team have had the information and data they required in order to make informed short and long term operational decisions about the development of the schools, without the added cost of employing a full time business manager while budget resources are tight. SBS specialists draw on the vast knowledge, experience and skills gained whilst working in many schools across the UK, focussing on best practice to help deliver on the vision of the schools.

## Next steps

With the continued growth of the trust, work is underway to transfer knowledge and skills to staff within the trust to ensure the continued success of the schools is built upon the firm foundations already laid.

SBS will continue to support the development and growth of the schools within the trust, ensuring that key staff are provided with the necessary training and skills. This will ensure long-term viability and effectiveness of the schools.

Longer term, as the trust expands and opens more schools, it is planned that SBS will contribute and support from the application stage and onwards. This will ensure the excellent solution already provided during the fledgling stages can be replicated across all schools.

SBS's adaptable approach to school business management and support is based on successful project planning and the implementation of processes and procedures, through a series of principles and techniques that adapt to changing requirements and timelines of the schools. Ultimately, this is achieved by improving communication, collaboration, continuous delivery and responsiveness to change.

To find out more about Finance services, contact the SBS team on 0345 222 1551 or email [sales@schoolbusinessservices.co.uk](mailto:sales@schoolbusinessservices.co.uk)

[www.schoolbusinessservices.co.uk](http://www.schoolbusinessservices.co.uk)

\* Information correct at time of printing