



Introducing our expertise:
Academy Advisory Services

It's what we
bring together
that sets us apart

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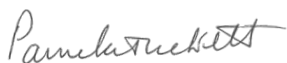
Welcome

We're delighted to have this opportunity to introduce you to our work in the Academy sector. In the following pages we demonstrate how our dedicated specialists support Academy leadership teams whatever their size, whether they're in Single or Multi Academy Trusts (MAT), newly established or consolidating a large MAT.

Having played a leading role in the Academy sector from its inception, our award-winning team is ideally placed to deliver tailored advice and guidance alongside our financial accounting and auditing work.

Our many happy clients (we're the number one auditor in this sector) appreciate the way we combine our knowledge of the legal and financial requirements with a clear understanding of the many practical challenges schools face on a day-to-day basis. A good number of our specialist team sit on various Trust Boards and steering groups, and the long-standing relationships we've built with the Department for Education and the Education and Skills Funding Agency give you a direct connection to people who are actively helping shape the future of the sector.

We hope you enjoy finding out what it feels like to be a Bishop Fleming client and look forward to working with you soon.



Pam Tuckett
Partner & Head of Education



Our Academy expertise: at a glance



Leaders in our field

No.1 firm to the Academy sector and audit the largest number of MATs.



Continued growth

We audit £2.4 billion of public money and £4.5 billion of land and buildings value.



Depth of talent

More than 140 members in our Academy team.



Focused Academy advisory team

Providing a range of specialist advice specific to the Academy sector, using our hands on experience of being Trustees.



We make a real difference

We audit 12% of all Academy schools, more than any other firm and our largest clients have 34 schools and £141 million income.



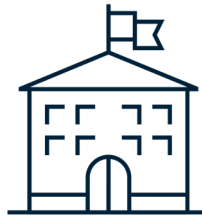
Unrivalled MAT expertise

We audit 39 Trusts with 10+ schools, 48 Trusts with 8+ schools and 71 Trusts with 5+ schools.

Influencing policy



Regular contact with the ESFA, RSC, a member of working group 3 and the BFR technical focus group.



Around 1,100 schools in 170+ Trusts

We act for around 100 MATs & 70 SATs.



Award winning

We're ranked as a Best Company and have won multiple awards, including 'Investing in People' at the 2022 Accounting Excellence Awards and were ranked 5th in the Mid-Tier Power Index 2022 by Accountancy Age.

Exceptional! client service

We request and listen to your feedback regularly via online surveys and provide frequent communication through blogs, ebulletins, and seminars/webinars.



Nationally recognised benchmarking

We lead the Kreston Benchmark Report.

Our deep service expertise

We deliver a wide range of services across the Academy and Education sector.



Audit and assurance



Governance



Risk assurance and internal audit



Tax



VAT



Due diligence and merger advice



Payroll services



Regularity advice



Strategic advice

In an ever-changing sector every Trust will need to regularly review and update its strategy, to ensure it is providing an educational environment where children and students come first.

Our advisory team can guide and support your Trust at any stage of this development. Our services include the following:

- Strategy support such as growth, merger, making significant changes (such as nursery, sixth form or trading subsidiaries), sponsorship and sale of land.
- Centralisation support which includes drafting policies (GAG pooling, exits, central function) plus review of the current structure, systems, controls and scheme of delegation.
- Deal advice which covers advice on negotiating the funding deal, other re-brokerage advice, due diligence and on-boarding.
- Readiness for growth – we provide support to ensure the Trust is ready for growth, be it new schools joining, a merger, or new activities. Our support can include a review of the central function, committee structure, reporting lines and quality of reporting.
- We can also act as facilitator for Governance away days which enables a Trust to draw on our extensive experience in a less structured way, often with a wide remit, when debating key strategic matters.

"The Trust and I work very closely with Bishop Fleming and, over the years, we have built up a very successful relationship where we feel we can freely seek advice and guidance on various emerging sector issues.

We very much see Bishop Fleming as a strategic partner rather than just our accountants and auditors. The ongoing guidance they provide help us to inform future financial decisions, and they are always only a phone call away.

In particular, the guidance provided during the COVID pandemic has been key, discussing matters such as PPN, Furlough and COVID grants. Through early discussion and guidance on the matters it has allowed us to remain compliant with the rules and requirements, but also ensuring as a Trust we can continue to achieve value for money.

I would unequivocally recommend Bishop Fleming to any School or Trust."

**Matt Matthew, Trust Business Manager
The Link Academy Trust**



Case study: Review of central finance function

Trust concerned about the effectiveness
of the central team

Issues to resolve

- Conflicts between LGBs, schools and central team
- Bottlenecks in communication chain
- Potential duplication of processes
- Inefficient use of software
- Management accounts not in line with Academy Trust Handbook or best practice



Solution

- Bespoke survey of finance staff using Survey Monkey
- Interviews with all key members of finance team
- Report for Trustees to show areas for improvement
- Recommendations on structural changes



Governance advice

Good governance is about setting the strategy, then making the right decisions based on full information, supported by robust controls, systems, policies and procedures.

We can help you adopt best practice across many areas of governance, including:

- Full governance review - we can provide external views to consider the effectiveness of governance practice within the trust. This can be at trust board level or look at how the various layers of all those charged with governance, operate and communicate together.
- Skills reviews - these can be done on the whole Trust or can be limited to a specific sub-group such as an individual committee or local governing body.
- Regularity matters - we can provide guidance on novel, contentious or re-percussive transactions, to ensure that all regulations are adhered to and that any decisions are made using full and relevant information.
- Conflict issues - we are regularly asked to support Trusts with either cultural issues, conflicts of interest, or simply where there is a difference of opinion.

All of our governance work is underpinned by a team that has experience of both advising and implementing, and therefore we bring a realism to any governance issue; we know first-hand that it is easier to offer advice as an external consultant than it is to actually implement change. We are sympathetic to this in all of our work.

Working together works better



Case study: Governance advice

Strategic decision to grow refused by RSC due to governance concerns.

Issues to resolve

- Trust Board under pressure from lack of capacity and skills, leading to a lack of challenge
- Trustees and Local Governing Bodies (LGBs) did not understand or acknowledge the real issues
- Growth plans on hold



Solution

- A full skills review of Trust Board, executive team & LGBs, including interviews
- A full governance review in line with the Competency Framework for Governance
- A clear action plan for Trust improvement
- Recommendations on structural changes needed



"Many thanks for this report, it is clear, benchmarks high standards, and doesn't shy away from necessary and robust recommendations, exactly what was asked for."



Financial governance

The frameworks around financial governance in the Academy sector are complex. The Academy Trust Handbook (previously the Academies Financial Handbook) is at the heart of good financial governance, but there are many other company and charity regulations to consider.

We are experts in all aspects of financial governance and can support your Trust with the following:

- Management information - we can provide guidance on what your Trust needs for each level of review. There is strict guidance in the Academy Trust Handbook and we can help you comply.
- Benchmarking and ICFP - these are intrinsically linked and our team have extensive experience in delivering both. Our work will highlight where cost savings can be made.
- Budgeting - we can support your Trust in all aspects of budgeting and forecasting. In this difficult financial environment many Trusts need support on 5-year recovery plans and Notice to Improve (Ntl) support.
- Taxation advice - tax is often inadvertently overlooked in an Academy. By discussing all your Trust's plans with us, we can ensure you consider all aspects of relevant taxes including VAT, corporation tax, stamp duty, PAYE and National Insurance (covering off payroll working and benefit in kind issues).
- Audit committee - we can work with your audit committee to review its practice and terms of reference to maximise its role and function.



Case study: Management Information

CFO seconded into CEO role, resulting in the appointment of an internal interim CFO.

Issues to resolve

- Lack of finance expertise of interim CFO
- Potential lack of monthly management accounts
- Management accounts not in line with Academy Trust Handbook or best practice
- Trust growing and needed expert advice to successfully onboard schools



Solution

- Short-term support package until new experienced CFO recruited
- Review of management accounts process including implementing best practice
- Preparation of management accounts
- Onboarding support including school level reviews



Due Diligence

Our specialist team at Bishop Fleming have undertaken a number of due diligence assignments in relation to Academy mergers.

At Bishop Fleming we are passionate about the Academy sector. We have an unrivalled reputation on advisory work which ranges from a full governance review, through to deal negotiations in a growing Trust.

Trusts are responsible for the safeguarding of millions of pounds of public money, and there is an expectation that the governance is therefore robust and in line with best practice. We have genuine experts who understand all the governance frameworks as they work with them everyday, both at Bishop Fleming and in their own positions as Trustees of Multi Academy Trusts.

The regularity framework for the sector is onerous and Trusts often find it difficult to navigate their way through all the legislations and handbooks. We can ensure you comply fully with the Governance Handbook, Academy Trust Handbook, The Companies Act 2006 and The Charities Acts.

Typical scenarios of where we find Trusts need our help are as follows:

- A Single Academy planning its future
- Multi Academy Trust developing its growth strategy
- Academy Trust in financial difficulty
- Academy Trust looking for financial efficiency
- Academy Trust with internal conflict between teams
- Academy Trust taking on new schools
- Our advisory team are at the forefront of the sector and regularly meet with policy makers at the DfE, ESFA and RSC. We are able to advise on a wide range of tactical scenarios and support the Trustees in their role as non-executives.



Bishop Fleming teamed up with VWV to deliver a webinar on the importance of due diligence for Academy Trusts.

Hear from experts on what you need to look out for, how DD is investigated, war stories plus risk management.

<https://youtu.be/7xesziJJCjE>



Case study: Due Diligence

Providing due diligence services on the merger between a MAT and a secondary Academy

Issues to resolve

- Concerns over budgeting process and forecast deficits, as a result of historical poor financial management
- Need for cashflow forecasting for the repayment of an emergency ESFA loan
- Concerns over the financial efficiency of the school's curriculum



Solution

- Agreement reached with the ESFA restricting the use of MAT funds to support the new partner
- Negotiation with the ESFA on the repayment terms of an ESFA loan
- Integrated Curriculum Financial Planning ('ICFP') metrics studied to identify areas for operational efficiency improvements



"We engaged Bishop Fleming to undertake financial due diligence on a new school joining the MAT. The team developed a bespoke due diligence scope that encompassed areas of emerging concerns. As part of the exercise we asked Bishop Fleming to complete an Integrated Curriculum Financial Planning (ICFP) benchmarking analysis. Both pieces of work were delivered on time and in a professional manner, and ultimately provided sound advice to inform the Trust's decision making. We would certainly use Bishop Fleming's services again."



Risk advisory services

We can offer you a number of areas of support, providing pragmatic, solution-focused, clear and easily understood advice. We'll provide you with assurance that everything you think is being done "on the ground" to stop your risks becoming a reality actually is happening in practice!

How do you know you are going to achieve your aims?

True risk management is not about being risk averse. We need to accept an element of risk in most things we do, and with support from Bishop Fleming you can instead be confidently and proactively risk aware. In other words, gaining assurance that you are currently effectively controlling the risks you face in practice, and so not allowing them to get in your way.

All Trusts have goals, aims and objectives describing what's important to you and where you want (or need) to move your Trust to as a result. Equally, all Trusts also have various factors (risks) that will hinder the achievement of these goals, or may actually stop them being achieved at all. But:



We can help you answer these questions.

In short, all Trusts no matter what size can benefit from a greater focus on the challenges that will stop or hinder them achieving their aims.

Just as importantly, to be successful, all Trusts need to obtain assurance that their planned action, response or mitigation to these challenges will be effective in practice.

Having a clearer idea about your risks and equally your ability to react to these continues to become a more explicit requirement in the Academy sector.

Moreover, it's just sensible business!

Spotting and side-stepping potential problems before they impact the Trust will help make the Trust more successful, more efficient and keep your costs down.

We can help you by:

- Assessing and strengthening how you monitor, manage and steer your Trust;
- Helping you reinforce your risk management, governance and internal control environment.
- Providing training, advice and related support so you know how well you are mitigating risks in practice.
- Delivering the more traditional core internal audits of risks and controls – from pure internal compliance to wider risk-based, assurance focussed audits. In addition to one-off reviews, we are also able to offer a fully flexible internal audit service. This service can be used on a regular basis to review and report on each area of the Trust or on a more ad hoc basis focussing on key risks.
- Carrying out more bespoke specific advisory reviews to help you answer particular questions, for example to demonstrate regulatory or contractual compliance in practice, such as procurement, or focussing on the efficiency or effectiveness of one of your functions or services.
- Helping set up or tailor your risk register/maps, widening this out to fuller assurance "stocktakes" / mapping, facilitating risk workshops and training, implementing and strengthening your Trust-wide risk management systems, processes and culture.
- Ultimately, helping to demystify risk management for your academy, and ensure it's something useful and helpful rather than a burden.

So ask yourself:

1. Do we know all the risks that could cause us a problem or stop the Trust achieving all our aims?
- AND
2. How do we know / what tells us that each of these risks is being effectively managed in practice?

Let us help you with the answers.



Case study: Risk register use

Turning an unwieldy, burdensome register (and process) into a useful and practical tool

Issues to resolve

- Trustees and management both unaware of core purpose and responsibilities with regard to risk management
- Excessively long risk register (>200 risks)
- “Risk Management” therefore seen as just an extra administrative burden with no value
- Lack of visibility and related assurance over actually how well key risks were addressed on the ground



Solution

- Workshop with Trustees and management to change perception and highlight practical benefits
- Review format and content of risk register – streamline, reduce and separate Trustee level and operational risks
- Greater clarity and visibility therefore for the Trust on its key risks, and therefore where to focus attention and discussion
- Link existing KPIs / related management reporting to the risks in the register to allow Trust to “complete the story” and answer “how do we KNOW we’ve addressed that risk”

General support & training



In this complex world of Academy Trust Governance it is often essential to be able to discuss issues with an external party. We can provide this support to all levels of leadership in an Academy, from Trustees through to local governors and senior leadership.

We can attend Board meetings to provide advice and guidance on a specific matter or alternatively, to provide guidance on the meeting itself, specifically process, decision making and minutes, using the Governance Handbook, Academy Trust Handbook and Competency Frameworks as the benchmarks.

We offer a support line to Accounting officers/CEOs, CFOs, Trustees, finance teams etc. This can be flexibly priced to suit your needs. Through our extensive team of experts we will always be on hand to answer your query.

We can deliver training on a wide range of topics. The content is always designed specifically for the audience. Our training includes:

- Sector updates
- Governance best practice
- Financial governance
- Technical accounting
- Regularity
- Risk management
- Budgeting
- Role of the audit committee

“Bishop Fleming’s professionalism and approachability has helped re-frame the school’s culture and provide a renewed benchmark of excellence.”

Their contribution to Board meetings has been key in contributing to the integrity and tenor of effective governance at the school.

Their specific expertise regarding financial governance has brought a level of rigour to scrutiny, but has been delivered in a way that is aimed at ongoing school improvement.”

Insight is better than hindsight



Delivering
exceptional client service
is at the heart of
everything we do.

A team for you

Our focus on relationships isn't just with our clients, but also between our people too. We are a firm that challenges, motivates and rewards in ways that our people appreciate, to provide a greater sense of purpose and meaning through our work with you.

We collaborate and share information, we help and support each other and we always put the best team together to meet your needs. We have an ongoing commitment to creating a positive and inclusive environment for our own people.

This is what makes us an employer of choice. And that's also why we're ranked as a **Top 5 Accountancy Firm to Work For** as part of the Best Companies rankings.



In everything we do, we are guided by our values

Our values underpin the way we do business. They sum up what our business stands for and what sets us apart. Through our commitment to our values, we always demonstrate that we are:

- Dynamic and forward thinking
- Passionate about our work
- Consistent in our delivery
- Honest with our advice
- Personable and friendly
- Adaptable to change



Meet our advisory team



Pam Tuckett FCA CTA DChA Partner & Head of Education

T: 01752 234309
E: PTuckett@bishopfleming.co.uk

“What makes Bishop Fleming different to other firms is their hands on experience that they can bring to the table and their ability to share the knowledge gained from their wide client base of MATs.

They are not only auditors, they also have the skills and expertise to carry out all types of advice; we have been able to draw on this experience for both governance and financial governance support.

I would not hesitate in recommending them.”

Dean Ashton, CEO
Reach South Academy Trust

Pam is a genuine expert and trusted adviser in the academy sector. She is well connected and regularly writes thought leadership articles.

As head of education she is passionate about the delivery of our services to the sector. Her portfolio of clients is wide ranging and includes not only education and charity clients but also owner managed businesses.

Pam is a Trustee of The Confederation of School Trusts which is a charity that advocates for the academy sector and is the national organisation for school Trusts.

Pam is a Trustee at Westcountry Schools Trust, which currently consists of 27 schools and £100M income and will continue to grow in the coming years. This gives her first-hand experience of the issues facing a large growing MAT. She is chair of the audit and risk committee and a member of the estates committee.

Pam leads our advisory work in the education and charity sectors. This has involved facilitating away days and strategic planning sessions, as well as full external reviews of governance.

Pam is a chartered tax adviser which means she is well placed to advise academies and charities on the implications of trading income and trading subsidiaries. She is also a Trustee of a small charity. This enables her to see financial procedures from a hands on perspective. The charity has recently negotiated a new partnership agreement with the Salvation Army.

Pam has a real client focus in everything she does which means that clients are always fully informed about progress with their work and the client service team are flexible to meet all the needs of the client. Pam is leading on our remote audit offering to our Academy clients.

Pam also leads on the firm’s women’s mentoring network and healthy environment as part of Bishop Fleming’s commitment to being a responsible business. Pam is a regular speaker at the ICAEW Academies update as well as ESFA training sessions.

Meet our advisory team



Alastair Campbell FCA Head of Risk Assurance & Internal Audit

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E: ACampbell@bishopfleming.co.uk

“The value that you’ve given me just from one hour’s phone call will be so much more far reaching and worthwhile to me in setting ourselves up properly with regard to risk management – I can’t thank you enough.”

CEO
Large MAT

Alastair is an expert in audit and risk assurance services, working for 25 years with a wide range of clients across the public, not for profit and corporate sectors across the country.

Alastair is used to working alongside senior management, boards and non-executives to build strong and long-term relationships and to deliver a first-rate client service. As well as leading core internal audit services to a number of Academy Trusts and wider education sector institutions, Alastair has also run a number of sessions for boards, audit committees and senior leadership teams in the sector focusing on risk management and assurance, to complement and support an internal audit approach that is focused on working with organisations to identify and strengthen their own assurances against key risks.

One of his key aims is to invest time with his clients to truly understand what they are trying to achieve, to then in turn be able to tailor our resulting support for them to minimise their risk and enhance their ability to achieve their aims.

Alastair readily understands a client’s need for solution focussed, pragmatic, clear and easily understood advice, and this fundamentally underlines his whole approach.

Alastair is also a member of an audit committee in the education sector which provides an opportunity to truly understand issues from a client rather than auditor perspective.

Meet our advisory team



Sally Timmins NLG
Audit Manager

T: 01803 206428
E: STimmins@bishopfleming.co.uk

"Sally is very experienced in Academy Governance and manages to distil a lot of legalese into understandable parcels of information. She has enabled our MAT to clarify the next steps in strengthening its framework, improving on overall governance."

CEO
Medium sized MAT

Sally is an expert adviser within the Bishop Fleming Advisory team specialising in matters of governance, both within the education and general charity sector. Working across all of our offices, Sally supports our clients across the entire firm.

Sally regularly designs and delivers bespoke training to our clients, but also a wider audience and has recently delivered induction for new CEOs and Chairs with the Department for Education. As a National Leader of Governance (NLG) with the National Governance Association (NGA) she receives regular training, information and updates direct from government, together with the opportunity for contribution in focus and discussion groups. Sally has great experience in matters of financial governance compliance and the Academy Trust Handbook, and supports clients with embedding a more thorough understanding for Trustees and where required Local Governors.

Sally is within a small number of NLGs accredited by the NGA on behalf of the DfE. As such she benefits from regular and comprehensive updates and training directly with the NGA and undertakes external reviews of governance.

Sally supports the "deep dive" approach for the audit committee into assurance on both financial and non-financial topics, including (but not limited to) board effectiveness, skills evaluation, induction, communication, pupil premium and governance. She supports the Trustees to answer the "how do we know" questions. Providing guidance to the audit committee she works with clients to support clarity and purpose to their voluntary position.

She focuses on a quality relationship, to understand and support the situation at hand. She has a passion for governance and works collaboratively to review and improve arrangements supporting trustees to focus on strategic priorities, to improve the effectiveness of governance. Sally has had extensive experience as a Trustee since 2008, and is currently Chair of Trustees at Torquay Girls Grammar School, one of the top performing secondary schools in the country. She is also a Director of the South West Academic Trust. As a Director, she has experience of school evolution from Local Authority to Academy, and also the formation and growth of Multi Academy Trusts.

Meet our advisory team



Sarah Chambers
Senior Audit Manager

T: 07966 947467

E: SChambers@bishopfleming.co.uk

“Sarah is friendly, knowledgeable, and approachable and acts as a critical friend for our MAT. She’s helped us with a range of finance and governance issues, processes and strategy and relates well both to our finance staff and to our directors. Her reports are well observed, the recommendations pragmatic and designed to help us improve. I have no hesitation in recommending her to other similar organisations.”

CEO
Medium sized MAT

Sarah works with education and not for profit clients to drive improvement and effectiveness and supports them with finance, risk management, governance and compliance.

Sarah has worked in the education sector for the past 15 years and is a fellow of the Institute of School Business Leadership. She works closely with her clients to build supportive relationships working on internal assurance, accounting support and wider governance and compliance issues. Prior to working in her advisory role, Sarah worked as a School Business Manager (SBM) in a large primary school. She has also worked in a broad range of sectors focusing on financial management, process improvement and restructuring.

Sarah has worked in an advisory capacity for the past six years, supporting Academies. Prior to that she worked as a SBM and finance lead in a 5 school umbrella Trust, taking the schools through Academy conversion and introducing new systems and processes, as well as the day to day financial management of the Trust, restructuring, budgeting and forecasting. She also worked collaboratively with other Trusts in local area procurement and providing support.

Meet our advisory team



Phil Redgate ACA
Senior Corporate Finance Manager

T: 01905 732123
E: PRedgate@bishopfleming.co.uk

“Phil Redgate and the team developed a bespoke due diligence scope that encompassed areas of emerging concerns. As part of the exercise we asked Phil and his team to complete an Integrated Curriculum Financial Planning (ICFP) benchmarking analysis. Both pieces of work were delivered on time and in a professional manner, and ultimately provided sound advice to inform the Trust’s decision making. We would certainly use Bishop Fleming’s services again.”

Paul Lonsdale, CFO
Richard Huish College and Trust

Phil is an expert in corporate finance, working closely with clients to gain a deep understanding of their visions and goals, developing dynamic strategies to help them to be achieved.

His wide-ranging experience includes: acquisitions and disposals, transaction support, Management buy outs and buy in’s, due diligence, fundraising, financial modelling, business valuations and corporate strategy.

Phil has advised on a variety of mergers in the academy sector. Due diligence projects include scenarios where an existing Multi-Academy Trust (‘MAT’) takes a new establishment into the MAT, a single Academy Trust or LA maintained school joins a MAT and also on the merger of multiple MATs.

Phil also provides strategic advice to Academy Trusts and MATs; recent projects have included financial modelling and Integrated Curriculum Financial Planning (ICFP). Phil has international experience, having been on secondment to Melbourne, Australia, through the firm’s Kreston network.

Meet our advisory team



Jon Sparkes CTA DChA
Tax Director

T: 01752 234340
E: JSparkes@bishopfleming.co.uk

“Jon’s wealth of experience with Academies is evident in the invaluable advice and support given to us. His proactive and pragmatic approach provides us with peace of mind that we are receiving the best possible advice.”

FD
Large MAT

Jon leads the firm’s tax advisory services to the education and wider charitable and not for profit sectors. He has more than 25 years experience of advising on direct tax matters.

He likes to build long-term relationships with his clients helping to align tax advice with commercial and personal objectives. Jon is well known for providing clear and succinct practical advice to his clients in order to help them optimise their overall tax position.

He has worked with a range of education institutions and charities at different stages of their development and is able to use his experiences to help clients achieve their objectives in a tax efficient manner.

He has worked with a wide range of charities, not for profit organisations and social enterprises helping them to minimise their tax exposure and maximise their social benefit. Specifically in the education sector he has worked with a variety of education institutions on the identification and management of non-primary purpose trading, the set up and operation of trading subsidiaries, structures for overseas operations, the efficient payment of corporate Gift Aid, advising on donor benefits and the implications for Gift Aid and employment tax issues.

As a qualified accountant Jon is also able to advise on both tax and accounting implications of proposed transactions. This includes consideration of regularity matters in the Academy sector.

His commitment to the not for profit sector extends to volunteering; he is currently Chairman of Devon Cricket Board Limited, which leads on the development of grassroots cricket in the county.

Additional specialists



Joe Scaife
Partner & Head of Audit

T: 0117 9100260
E: JScaife@bishopfleming.co.uk

Joe specialises in Diocese MATs, advising on expansion of existing MATs and MATs with rapid growth. Joe holds a variety of Trustee and voluntary roles in the charity and education sector.



David Butler
Partner & Head of Charities

T: 0117 9100294
E: DButler@bishopfleming.co.uk

David is our lead author in the annual Academies Benchmark Report which is produced to help Trustees, Governors and senior leadership gain a deeper understanding of the financial performance of their Academy.



James Finnegan
Corporate Finance Partner

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James heads up our Corporate Finance department. The team helps Academy clients to understand and mitigate the risk of acquisitions and mergers, limit their financial exposure and plan for the future.



Len Dean
VAT Partner

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Len leads on all our VAT advice to the Academy sector. This includes advice on partial exemption calculations, property transactions and transactions with Dioceses.



Lee Hellingsworth
Senior Payroll Services Manager

T: 01803 206421
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Lee is a member of the Institute of Payroll & Pensions with more than 25 years experience in delivering compliant payroll services. Lee heads our payroll team who are responsible for delivering a full payroll service to around 30 MATs.



Adele Clapp
Tax Director

T: 01392 448828
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Adele leads on our PAYE and IR35 advice to the Academy sector. She is involved in assisting with HMRC enquiry visits and regularly deals with queries such as self employed status and employee expenses.

Adding value and keeping you up to date

We believe our added value services to be unrivalled and are committed to keeping our clients abreast of the latest sector insights, industry developments and other useful information. Our Academy team ensure that all of our clients benefit from receiving advice from experienced, well-qualified and genuinely well informed specialists.

The added value services you receive as a client include:

Kreston Academies Benchmark Report

Our Benchmark Report is acknowledged sector-wide by Trusts and regulators. With our detailed access to the underlying data, we can provide unique insights into your relative performance and position locally and nationally. We will provide you with a personalised report allowing you to benchmark your Trust.

www.bishopfleming.co.uk/insights/academies-benchmark-report-2022

Key Facts Document

We have developed a key facts document to assist Trustees in understanding the core financial position of the Trust. This document examines fund balances by school and compares to future budgets to identify key risk areas.

YouTube

All of our webinars along with other online content can be viewed on our YouTube channel whenever is convenient for you. Allowing you to go back and re-watch a section of advice or revisit a helpful hint or tip.

www.youtube.com/user/BishopFlemingSW

Education Knowledge Hub

Our Academy Knowledge Hub is updated regularly and curates the latest sector related content, insights, blogs, videos and contacts from across our website into one focussed area, together with animated content. This allows you to access and share all the information and guidance you need quickly and easily.

www.bishopfleming.co.uk/insights/hub/education-hub

Monthly Email Newsletters

Twice a term you will receive insights, video content and top tips. Sign up to receive our newsletter here > www.bishopfleming.co.uk/signup



Webinars & Seminars

Each year we hold two client only seminars/webinars in February & July to update you on the latest sector news, provide updates on the Academy Trust Handbook, Academies Accounts Direction and AAR forms, along with technical updates and share best practice. Throughout the year you will also receive invites to a variety of other events, courses, training opportunities and collaborative sessions with software providers, legal experts and property consultants.

Advisory Team

Our specialist Academy advisory team provide regular updates via our email newsletters and can advise on governance, financial governance, risk assurance, due diligence and much more.

Tax & VAT Services

We have a large and experienced tax team who have provided VAT advice and support to a large proportion of our academy clients and are able to advise on the tax position of transactions including subsidiaries.

Audit Advice Helpline

Our free helpline for use throughout the year, gives you the opportunity to speak directly to a member of the Academy team who will help you with your query.

EFSA

We have regular discussions with the ESFA and contribute to a number of their focus groups. The ESFA also regularly present at our client seminars, including as a key note speaker at our centenary full day conference in 2019. Our Academy team are at the forefront of the sector and make sure your voice is heard and your questions answered.

Sector Updates

We provide sector updates at every client meeting we attend. We will share best practice and our experiences with you throughout the audit process.



To find out how we can help you or your business, contact us:

T: 03333 21 9000

E: advice@bishopfleming.co.uk

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