# **News** Bulletin



# Issue 1: 6 September 2023





In this week's edition...

AUDIENCE	TASK
All	Info
All	Info
All	Info
Heads, SBMs & HR	Action
Heads, SBMs, Clerks & DSLs	Action
All	Info
All	Info
Heads, SBMs, Chairs and Clerks	Action
Heads, SBMs	Action
Heads, SBMs	Info
SBM's	Info
Heads, Chairs	Info
Heads, SBMs	Info
AUDIENCE	TASK
SBM's	Action
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# News Bulletin



# Issue 1: 6 September 2023





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### Introduction

I hope that the start of term has gone really well. As ever, there have been a few additional challenges and I think particularly of Jo Keeble, managing the end of the temporary school construction project at Yatton and of Louise Blundell at Gordano grappling with RAAC. Both Jo and Lou have received excellent support from my colleagues Tim Monelle, Mark Middleton and Neil Harris in the Central Team and we are in a strong position to get school started in both locations.

A very warm welcome to Steve Lung at Flax and Lucy Sargent at Portishead Primary. I wish them every success and happiness in their important new roles and also to Richard Riordan taking up the reins at Golden Valley. I would also like to welcome Neil Lankester and Natalie Wilcox to their new posts supporting our schools.

The financial pressures of last year have been carried forward and you will see below that Louise Malik has written a succinct summary of the key issues. We will need to adapt the way that we operate both individual schools and our Trust as a whole. I appreciate that some of these changes will be unwelcome but others may be timely and necessary. Even though our Trust is not that old, I already feel that we have outgrown some of our thinking and systems and I want to embrace change where it makes us more effective and efficient. We will all be working closely together on the review of the operating model that Louise refers to and as always, we will do the work better because many minds have engaged with the problem.

We celebrated a strong set of primary outcomes in July and I am glad to say that the indicative progress measures for the secondary schools look good too. I took particular pleasure in Chew Valley School's results which represent a real step forward in progress.

Lastly, we have a new issue time for the LSP Bulletin. You should in future receive the bulletin to your inboxes on Wednesday mornings.

Gary

Gary Lewis, Chief Executive

## Welcome to new LSP Central Team colleagues

As we start this new academic year we have a number of new colleagues joining us in the Central Team:

- Natalie Wilcox—Director of Secondary Education
- Neil Lankester—Director of School Improvement
- Sarah Calderwood—Central Team and CPD Administrator
- Lynne McCullough—Lead Teacher (two days a week until December)
- Stephanie Franklin— see item 'Financial Position' article below for more details

Click here for a full list of 'Who's who' in the Central Team.

Please feel free to contact us at any time with any questions you may have: 01275 841396

## Financial position of the Trust and action required

On Wednesday 19 July the Board of Trustees agreed the budgets for the 2023-24 financial year that had been submitted by schools. This information included the Government's proposals in relation to the Teacher's pay award for September 2023 and the associated grant funding. On Thursday 20 July we provided a file to all Headteachers and Business Managers which contained some useful KPIs from the budget setting process. We think that sharing these KPIs will be helpful as you begin to consider projected deficits for the 2024-25 financial year and may also prompt some conversations between schools.

We also thought that it would be helpful to provide an overview of the financial position of the Trust for the next three years based on the submissions from schools. This is detailed in the table below:

Trust finances based on Approved budgets	2023-24	2024-25	2025-26
Projected overall reserves b/fwd (surplus)/deficit	£(4,637,995)	£(3,162,994)	£(290,769)
Known one off spending not included in budgets	£489,087	£0	£0
Total in year deficit	£985,914	£2,872,225	£5,611,763
Projected overall reserves from budget setting process (surplus)/deficit	£(3,162,994)	£(290,769)	£5,320,994
Overall reserves as % of income used to calculation Core Services Charge	4.79%	0.44%	-8.02%

The figures above demonstrate the scale of the action required to set a sustainable budget for the 2024-25 academic year and beyond. As you will know, this position was anticipated and we have been preparing for the necessary actions through our resourcing our partnership meetings, schools leaders meetings, chair forums etc.

The consultation on the Reserves Policy proposed that schools be required to make sufficient savings within their budget for 2024-25 to set an in year balanced budget with no further utilisation of their accumulated reserves. The impact that implementing this policy would have on the overall financial position of the Trust is provided below. This puts the overall Trust in a much more sustainable financial position but will be a significant challenge to achieve.

Continued....

Trust finances incorporating required savings	2023-24	2024-25	2025-26
Cumulative reductions required in spending/savings	£(15,000)	£(3,095,758)	£(5,545,927)
Projected overall reserve c/ fwd incorporating savings (surplus)/deficit	£(3,177,994)	£(3,401,527)	£(3,335,692)
Overall reserves as % of income used to calculation Core Services Charge after savings	4.82%	5.13%	5.03%
School held reserves	£(2,525,862)	£(2,788,603)	£(2,874,243)
Central Services reserves	£(652,132)	£(612,924)	£(461,449)

We need to begin planning for these changes straight away. There are two key strands to this work:

The first of these is working with schools to reduce spend:

The introduction of the Learning Partners model in primary schools is a key element of this, but all areas of schools spend will need to be considered as part of this process.

We have developed a plan to support schools to set a balanced budget for 2024-25. We have identified that out of our 22 schools/groups of federated schools, 19 will need to make savings to set a balanced budget in 2024-25 and in many cases, this will involve a change to the staffing structure, through a change management process. This work needs to be more or less complete by Christmas 2023 to enable the appropriate consultation and notice periods ahead of September 2024 implementation. Supporting 19 schools/federations through this process will be a significant undertaking.

Steph Franklin has been working with the Central Team for the last year on a part time basis as our Sustainability Officer. We are delighted that Steph will be joining us full time in September and will be project managing the change management processes for us.

Steph will be contacting schools in early September to plan the change management process and set up the necessary meetings. With such a large number of schools to work with we will have very little flexibility with dates so I would ask for your flexibility and understanding as we try to confirm the arrangements. We also request that your master scenario on IMP and your ITrent data is as up to date as possible to facilitate this work.

The change management process will happen in four stages as detailed below:

Stages in (	change management process	Including	Date
Stage 1	To analyse current staff de- ployment model, cost of SEND provision and other non staffing budgets	Led by Project Manager with Head and SBM	Dates set in Septem- ber for late Septem- ber and early Octo- ber 2023 meetings
Stage 2	Devise and cost alternative staffing structures	Coordinated by Project Manager with member of Central Finance Team, Head, SBM and LGB rep. Education team involvement as necessary e.g. in relation to SEND provision	2023
Stage 3	Identify HR implications of proposed models	Coordinated by Project Manag- er with member of Central HR Team, Head, SBM and LGB rep	
Stage 4	Produce costed business case to share with LGB & Trustees	Coordinated by Project Manag- er and produced by Head	December 2023

The second key strand is reviewing our overall operating model:

To date our model has had a small central team with a large number of functions delivered in individual schools. Whilst we still recognise the benefits of this model, there may be financial saving or efficiencies by making some changes e.g. centralising some services, ultimately enabling funding to be prioritised toward educational delivery. We are currently considering this area of work and have the following draft timetable to share with you:

Operational Review - draft plan	Dates
Initial ideas considered by the Board of Trustees	26 <sup>th</sup> September 2023
Initial ideas issued to schools for feedback	2 <sup>nd</sup> to 20 <sup>th</sup> October 2023
Feedback meetings	10 <sup>th</sup> October 2:00pm and 12 <sup>th</sup> October 2023 6:00pm
Proposals for consultation considered by the Board of Trustees (including draft changes to Core Services Charge Policy and Scheme of Delegation)	12 <sup>th</sup> December 2023
Formal consultation on proposed changes	16 <sup>th</sup> January to 9 <sup>th</sup> February 2024
Decision on arrangements for 2024-25 (including Core Services Charge Policy and Scheme of Delegation)	28 <sup>th</sup> February 2024

Details of this plan will be confirmed at the Trustees meeting on 26th September and then communicated with schools, but we thought it would be useful to share this information as early as possible.

This will be a significant challenge for us but we will keep the quality of provision for children and young people at the heart of our decision making.

# Reminder: Invitation to LSP Introduction Events for new staff

As mentioned at the end of last term we will be hosting four welcome events for all new LSP staff (one in each hub) over the next few weeks.

New starters, already uploaded to iTrent, were emailed a reminder of this invitation yesterday (Tuesday).



Click here to download a copy of the invitation letter should you have any queries.

The deadline to sign up for one of the sessions is 9.00am on Friday 8 September.

These events will cover key information about the Trust including employee support, benefits and discounts, HR systems etc.

### Reminder: LSP Safeguarding Policy

At the end of July the Trustees approved the Safeguarding Policy effective across the Trust from 1 September 2023.

<u>Click here</u> to download a template word version of this policy which needs to be updated/amended with specific details for your school site(s).

Please can you ensure that this policy is updated with information specific to your school site and published on your website by the end of this week (any old versions of this policy and any copies of the Whistleblowing (safeguarding) policy need to be deleted/removed).

Your Local Governing Body (LGB) will need to note this policy (once updated with your school details) in their first meeting of the year.

As the policy has been updated, and the release of Keeping Children Safe in Education (KCSiE 2023) you will also need to check that safeguarding information across your site is updated for example:

- Update documents on Safeguarding Board at school
- Update safeguarding information on website and any parental/ carer information around school site

A copy of the new policy (without school specific details) is already on the LSP website.

### **Reminder: Trust-wide Policies**

Trust-wide operational policies can be found on the <u>LSP website</u>. A reminder that all schools within the LSP must use these policies and they supersede any policies previously in place for those schools who have recently joined the Trust.

If your school has a E4Education website a link to this page is automatically in place to direct people to the LSP website to view these documents.

For those schools with another website provider please ensure that your website has link directing viewers to the LSP Policies page.

Trust-wide HR Policies can be found on Foldr, and accessed by employees via the LSP Gateway.

### **Policy Update**

During June and July we consulted with stakeholders on the Principal Accounting Policies, the Reserves Policy and the Investment Policy. The Finance Committee have now met an agreed the final policies and these will be ratified by the Board of Trustees on Thursday 7 September. These finalised policies will then be issued to schools.

## Health and Safety Policy-LGB action required

Following the consultation on the Health and Safety policy we are making the final few changes before this is published: these changes will not impact schools' Health and Safety responsibilities or your delivery of them.

The policy does contain the requirement, as indicated in the consultation document, to establish a Health and Safety (H&S) Committee if you do not already have one. Also your Local Governing Body (LGB) will also need to identify a Link Governor for H&S. You may have already done this, in your Term 6 meeting, or will be scheduling this for your first meeting LGB in the coming weeks.

We will update you again, in the bulletin, once the policy is finalised and will also provide more detail on the structure and format of H&S committees.

In the meantime if you have any questions about implementing the H&S committee, please speak to your Hub Estates Lead.

### RPA Certificate 2023-2024

Please click <u>here</u> for the RPA membership certificate for this academic year. You will need to display a copy of this in your School Reception.



### **Teachers' Pay Award for September 2023**

The proposed teachers' pay award is currently going through a 10 week formal consultation process and will then be laid before parliament for approval. We anticipate the process is likely to conclude during October.

We have consulted with our union reps, through our Employee Liaison Committee, on whether to reflect the proposed pay award in September pay for staff. We have been reminded through this process of the potential implications of implementing the proposed award ahead of parliamentary approval and as a result we have decided not to do so.

Depending on when we receive the parliamentary approval, we anticipate that the award will be reflected in either October or November pay and backdated to September.

### **Aspens Contact Details**

Please be advised that David Britton, LSP Operation Manager, is not available for the start of the new term. If you have any queries please contact Ali, Jayne and Karen using the emails below;

karen.roberts@aspens-services.com

alison.sheldon@aspens-services.com

jayne.parsons@aspens-services.com

# Updated DfE Guidance—Suspensions and Permanent Exclusions

The Department for Education have released new guidance, effective from 1 September 2023, in regards to <u>suspensions and permanent exclusions from school</u>.

The main changes include parents' right to request remote meetings and changes to arrangements for cancelling suspensions/exclusions.

Please ensure you are using this new guidance going forward.



### Management of asbestos

From September 2022 to March 2023, HSE carried out over 400 inspections of primary and secondary schools across England, Scotland and Wales to assess how they are managing risks from asbestos.

The inspections showed that most schools—were complying with their legal duties and had effective systems in place to manage and monitor the condition of asbestos-containing materials (ACMs).

A small number of schools (7%) had significant enough failings in their systems, meaning enforcement action was required to address them. Most of these failings related to improvements being needed in their management plans or surveys.

HSE has published a <u>report</u> giving full details, including the key findings that schools should:

- keep an up-to-date survey clearly showing the location of asbestos and highlighting any areas not surveyed
- identify any action required by the survey, check to make sure it is completed and update records
- have a clear asbestos management plan specific to the site, and regularly review it regularly
- monitor the condition of ACMs
- have effective procedures for dealing with any unplanned disturbance of ACMs and providing accurate information to emergency services attending the site
- ensure staff have clear roles and responsibilities for managing asbestos and ensure deputies or contingency plans are in place to cover for absences
- ensure contractors provide risk assessments, method statements, and evidence of asbestos awareness training.

We are confident that we are taking all the right steps in our management of asbestos but, if you were the subject of one of the HSE inspections and have not yet shared the findings with us, please could I ask you to forward the report to your Hub Estates Lead.

During term 1 the Hub Estates Leads will be reviewing the results of the asbestos surveys that we have commissioned for all schools and prioritising our actions. Funding has been set aside from our School Condition Allocation for a programme of asbestos removal which will be guided by the surveys. Please be reassured that we have already responded to any urgent issues raised in the surveys.

Our Estates away day on Tuesday 17 October will cover asbestos management arrangements in greater depth.

### **New Approved Budget for Forecasting**

The budget set as the Approved Budget for Forecasting for 2023-24 is not the budget agreed by your LGBs. It has been agreed that due to the requirement for schools to meet the budget that is set for the financial year (as outlined in the Reserves Policy to be ratified by the Trust board on 07/09), it would be prudent to monitor against the version of the Approved Budget updated for the Teacher's Pay Award, additional TPAG funding as well as increases to Core Services charges due to the increased funding. These increases in expenditure and additional income are out of individual school's control. The updated version of the Approved Budget is Approved Budget 23/24.6 Inc Teachers' Pay Award and you should share the Multi Year Budget Review summary report with your LGB at their next meeting

### **Budget Monitoring using IMP**

As you know, all schools will be using IMP for budget monitoring (referred to as forecasting in IMP) from September 2023. Forecasting using IMP will enable schools to start a cycle of continuous improvement, where changes made whilst forecasting will feed future years' budget planning. IMP will enable schools to have a snapshot of their budgetary position monthly with just a light touch, with more thorough forecasts when formally reporting projected outturns to the LGB and Trustees three time per year. However, we recognise that it will take a couple of months to get forecasts to this stage.

In order to support business managers and enable schools to use IMP to produce accurate forecasts, we have prepared some guidance on Budget Forecasting using IMP - available to download <a href="https://example.com/here">here</a>. We also recommend that business managers watch the IMP webinar on Forecasting before starting their first forecast.

We have also prepared some <u>guidance</u> on the main income streams that may help has a prompt while you undertake a forecast. We'll keep this under review and update as appropriate.

Additionally, we have organised drop-in sessions over October and November so schools can work on their September forecast (ideally) and October forecast (definitely) with some hands-on support from the Central Finance Team as required.

The drop-in forecasting sessions will be on the following days and locations. Business Managers will need to bring their own laptops for these drop-in sessions as well as any supporting information they require. Please email Sue Warneford-Thomson to book a place and before attending a session so that we can manage the number of SBMs attending any one session to maximise support.

Date	9.30am— 12.30am	1.30pm- 4.30pm	Location
Thursday 12th October	N/A		LSP
Monday 16th October		N/A	LSP
Tuesday 31st October		N/A	Chew Valley School
Tuesday 7th November		N/A	Backwell School
Monday 13th November		N/A	Churchill Academy & Sixth Form
Tuesday 14th November	N/A		LSP
Monday 20th November	N/A		LSP

More sessions can be added if required and, of course, we are available to contact for support at any time.

We will be organising training sessions for Heads, Governors and Trustees to interpret the reports from IMP in October and November - dates to follow.

# 2023-24 Financial Year - Monthly Schedule of Finance Deadlines

Please <u>download</u> the schedule of finance deadlines for the 2023-24 financial year, including dates for processing transactions, monthly accruals and prepayments and the dates of uploading budget monitoring data. Where the deadline for accruals and prepayments falls in a school holiday, please send your template to <u>lspfinance@lsp.org.uk</u> in advance. Please use the up-to-date <u>template</u> for your monthly return - including nil returns.

You will see an additional task for schools to action any virements in the Approved Budget on IMP. This may not be applicable to many schools, but if a school wishes to make any virements (i.e. the process used for transferring an agreed financial value from one budget heading to another), these should be planned and subject to authorisation (as detailed in the Finance Policy). Virements should not be made to cover an unplanned over or underspend. If virements are agreed by their LGB, you have effectively set a revised budget and these changes will need to be made to the Approved budget on IMP. The Finance Team will copy a new version of the Approved Budget ready for any virements at the beginning of each month. This revised version will be saved and frozen and set as the default Approved Budget for reporting purposes, and uploaded to PSF for any school which has agreed a revised budget. The date this is actioned each month is also fixed as part of the schedule. Schools will be notified of the version on which they should make any amendments.

## Monthly Finance Checklist 2023-24

Please <u>download</u> the revised monthly finance checklist for 2023-24. The checklist has been updated to include revised dates, updated links to instructions for payroll reconciliation using IMP as well as a reminder to update the IMP Master Scenario with pupil numbers after the October 2023 and January 2024 pupil censuses have been run.

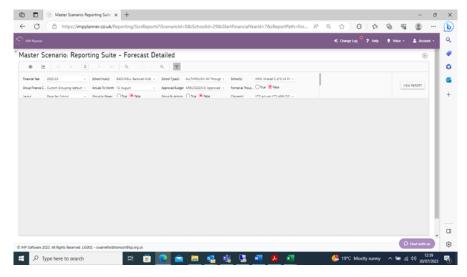


### 2022-23 Audit Work

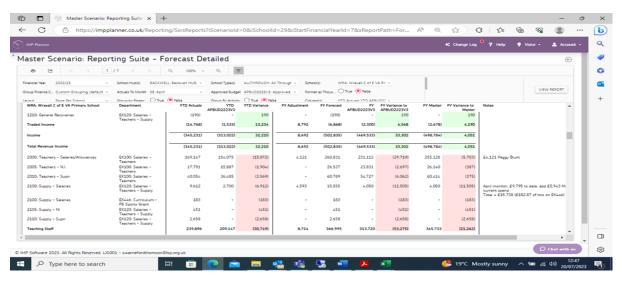
The deadline for completion of the Audit Workbooks and upload of supporting documentation is Wednesday 20 September. Schools should have access to the Audit Workbooks via the secure Teams team called LSP Audit Workbooks - Secure. Please let the Finance Team know if you are unable to access your workbook.

Initial August Monitoring reports will be available in IMP on Monday 11 September. This will give schools an early indication of both revenue and capital balances before the year end journals from the workbooks are processed. The Finance Team will have prepared the Forecast based on actuals to date, removing any previous adjustments made and assuming that trips income and expenditure balance. To review this projected outturn on IMP, you should go to the Reporting Suite - Forecasting - Detailed. Select August as the Actuals per Month and View Re-

port.



You should review income and expenditure in detail - this will aid your completion of your Accruals and Prepayments for the Audit Workbook. This report does not contain details of the 2021-22 balances b/fwd but will give you total projected income and expenditure and the in-year surplus deficit for both capital and revenue. Example shown below:



You can run a Multi Year Overview report (again selecting August for Actuals to Month) to give you the projected outturn at this stage of the closing process.

Once the journals from the Audit Workbooks have been processed by the Finance Team, a revised version of the August Forecast will be prepared (so please do not freeze the earlier version on IMP) on Tuesday 3 October for further review and completion of the Funds Workbook. The Funds Workbooks will be added to the LSP Audit Workbooks secure team at a later date.

### **Employee Self Service (ESS) User Information**

If you are a first-time user of the system, instructions for accessing the portal are included within the email containing your first payslip. Your login name is your school email address. If you do not have a school email address your username will be the Reference Number located on your payslip underneath your name. Your first-time password is the same as the 8-digit account number of the bank or building society account to which we make your salary payment. Unless you have changed this previously on the portal.

Your school may also have provided you with a link to the portal from your school intranet page. <u>ESS - Login (webitrent.com)</u>. Enter your Username and Password as detailed above and click Login. If you have forgotten your password, select the "Forgotten Password" link on the portal login page.

On the menu you will be prompted to give your username and the email address held for you on the system. The username for this must be your 8-digit payroll reference number - this is located on your payslip under your name. If you do not have this, please contact your local school administrator who will be able to supply this information. Please note that the email address is lowercase. An email will be sent within 15 minutes to the email address held for you on the system.

Lou Carey HR Administrator

### **GDPR E-Signature Document**

Please can you ensure all staff login to iTrent Employee Self-Service to acknowledge and action the GDPR e-signature document which is accessed when logging into iTrent:

#### ESS - Login (webitrent.com)

This is a prompt for all staff requiring their personal and sensitive information to be updated to ensure we hold current and accurate records for our annual GDPR check & Workforce Census purposes.

For guidance on how to update personal and sensitive information on iTrent, please follow the below link:

iTrent Guide

We have asked for this action to be completed by the end of September.

### Annual Safeguarding Declaration for all LSP staff

Staff also need to log into the iTrent Employee Self-Service to electronically sign the Annual Safeguarding Declaration.

#### ESS - Login (webitrent.com)

Staff will get most benefit from reading the Safeguarding Policy, once it has been adapted specifically for your site (see earlier item).

We have asked for this declaration to be completed by the **end of September at the latest** (you may want to set an earlier date if more appropriate for your school setting).

School Business Managers can check who has completed the declaration in iTrent under reports: People Reports, E-Signature Correspondence Summary.

# Reminder: Register of Pecuniary Interests and Gifts and Hospitality Declarations for Governors

As per the Business Ethics Policy a reminder that all Governors must complete a <u>Register of Business</u> and <u>Pecuniary Interests form</u>.

Also, if applicable, as per the policy, they also need to declare any gifts or hospitality they may have received.

Please ensure you send up your summary of the returns for your Governors by Friday 22 September to <a href="mailto:lgbreturns@lsp.org.uk">lgbreturns@lsp.org.uk</a>

If you have any questions please contact Chris Hills, Governance Professional.

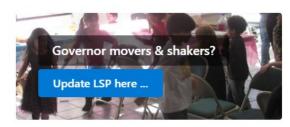
### Governor links for 2023-24

Once you have established your link governors for 2023-24 please can you email a list of names, email addresses and link roles to <a href="mailto:lgbreturns@lsp.org.uk">lgbreturns@lsp.org.uk</a>.

As mentioned in an article above this does need to include a link governor for Health and Safety from this year forward (if not already in place). All boards must also have a Safeguarding Link Governor

We can then contact specific link governors if and when required with specific information; training or forums for example.

## Changes to your LGB—notifying the LSP Central Team



On the <u>Clerks' SharePoint homepage</u> you will find a link to a form which needs to be completed each time you have a change, addition or resignation from your Local Governing Body.

Please complete this form as swiftly as possible so that the Central Team and Trustees are informed of any changes promptly.

It is worth noting that Trustees can make re-appointments in advance (for example reappoint in December for a term of office which will expire in February 2024).

You do not need to wait for trustee approval before starting DBS checks etc for a new governor. They are also welcome to join training sessions. However they cannot vote before their appointment has been noted and confirmed by the Board of Trustees.

Again, if you have any questions please contact **Chris Hills, Governance Professional**.

### Clerk to Governors Vacancy - Interim Support

You may have seen the recent advert for Clerk of Governors at a few LSP schools (mostly Portishead/Nailsea based).

If any Clerk would be to offer any additional hours in the short term to support whilst we complete the recruitment to this post it would be very much appreciated.

If you want to find out more/can offer to help please email Chris directly.

Payment would obviously be made for any additional hours.

## KEY LINKS, DATES AND DEADLINES

We have created this new section of the bulletin as a summary of key links and deadlines which hopefully you will find helpful.

This does not replace to Annual Planner so please ensure you are checking this regularly.

If you can think of anything else that could be included please make your suggestion to <u>Diane</u> <u>Logan</u>, Communications Officer.

Please note the following links will only work for those who already have access to the relevant site or folder. If you feel you need to be given permission to access something please let us know.

### Click here to access the Annual Planner (via Sharepoint)

DATE	KEY DATE OR DEADLINE	FAO
18- 29 September 2023	Headteacher Appraisals to be completed by Friday 29 September	Heads & Chairs
Friday 22 September 2023	Deadline to submit Register of Pecuniary Interests and Gifts and Hospitality declarations LGBreturns@lsp.org.uk following LGB review.	Heads, SBMs & Clerks
Friday 29 September 2023	School Development Plan (SDP) and SEF, following LGB review, to be sent to LGBreturns@lsp.org.uk	Heads/Clerks
Friday 29 September 2023	Deadline for UPS applications to be sent to hr@lsp.org.uk	Heads
Wednesday 4 October 2023	School Leaders Meeting @ Nailsea Baptist Church	All Heads

Trust-wide operational policies can be found on the LSP website.

A reminder that all schools within the LSP must be using these policies and they supersede any policies previously in place for those who have recently joined the trust.

#### 'Appraisal Season'

All staff appraisals (except Heads) should be completed by Friday 20 October (end of Term 1).

Templates for these documents can be found here

#### Foldr

### LSP Communications SharePoint

Please ensure you download a copy onto your school server before circulating to staff.

