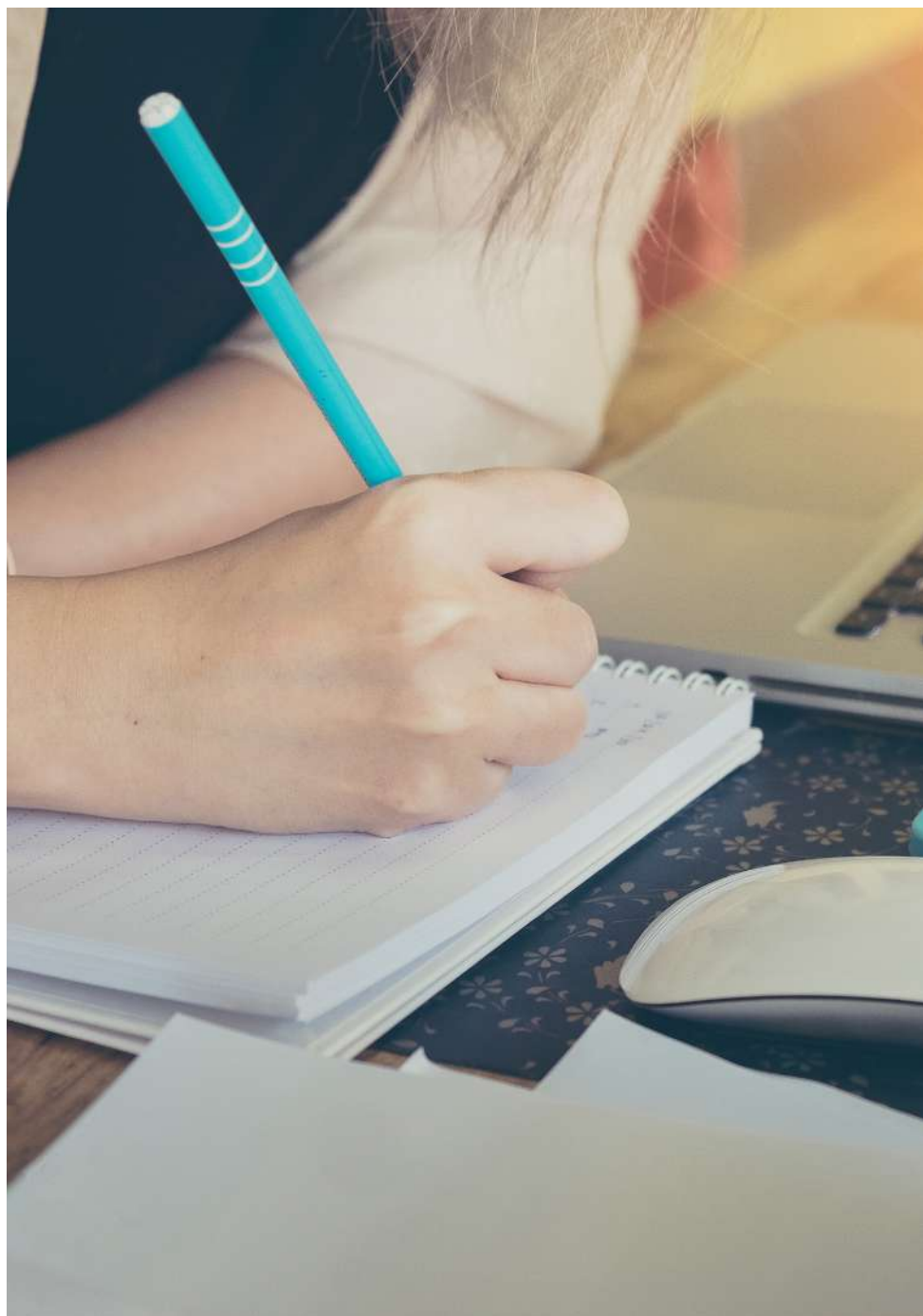
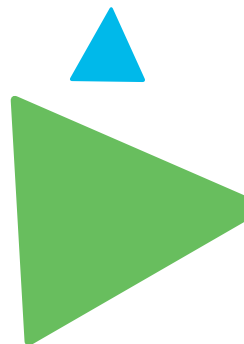




Education Support Packages & PRICING OPTIONS



Wolferstans' dedicated team of Education Solicitors providing specialist legal assistance for your educational establishment.



SERVICE GUARANTEE

Wolferstans are committed to providing an excellent level of client service, better than most, and we are prepared to put our money where our mouth is in this regard; if you change provider to Wolferstans, but do not consider that you have had exceptional client service from us via the use of one of our packages, you may unilaterally reduce our fee by up to 20% with no strings attached.

ON GOING LEGAL AND HR SUPPORT

We offer platinum packages which not only provide the peace of mind required for the day to day running of your Trust or School, but also includes strategic support for bigger projects and all at a competitive price, with unlimited usage (save for the exclusions) and access outside of normal business hours. However, we appreciate that not all Trusts or Schools are alike, and we recognise that this high level of support may be inconsistent with either your budgetary constraints or you may have inhouse expertise meaning that you do not require this level of investment in legal assistance and you might prefer to opt for HR and/or Legal Plus which have a capped usage of 5 and 2 hours per term.



We are the preferred legal partner of both the Cornwall Association of Primary Heads (CAPH) and the South West Institute for Teaching (SWIFT) with James Twine and Victoria Sargeant both sitting on the Board for CAPH.



PLATINUM HR AND EMPLOYMENT LAW SUPPORT

This package entitles your Trust or School to unlimited access (telephone, e-mail and virtual meetings) to our specialist Schools support team in relation to any staffing matters. The majority of support tends to relate to disciplinary and grievances, performance management and capability, managing long term absence, handling flexible working requests and advice relating to entitlements and varying terms and conditions. However, subscription to the platinum package also entitles your Trust or School to strategic support and even project management when it comes to those complex and more difficult projects such as restructures and redundancies or the removal of senior individuals. Typically, strategic support would include a face to face meeting with the Headteacher (and governors if you wish) where we ensure the process,

timescales, costs and next steps are fully understood in addition to providing a template and assisting you to draft the business case/plan and provide full support for any subsequent union consultation.

We feel that we can add real value when it comes to those tricky issues such as managing long term absence and underperforming staff. For example, if we advise that a member of staff should be referred to OH we would work with your School to ensure that the OH report was as useful as possible - in our experience unless you ask the right questions you do not get the right answers. Therefore, and by way of example, we will provide a tailored list of questions which generally produce OH Reports of a higher standard.

Similarly, if it is appropriate to have a protected conversation we will advise you of this fact and where necessary conduct the negotiation (usually with the member



of staff's union representative). For the avoidance of doubt, the following services are all included within the platinum package; unlimited HR/employment law support, drafting and approving of letters/documents, negotiations and consultations with unions, bespoke drafting and negotiation of settlement agreements, support to governors for panel hearings and pay appeals, education law updates, drafting/reviewing policies and contracts in addition to access to our online Schools Policy Portal where you can download policies and other useful documents.

Signing up to our platinum package will also mean you have the benefit of a guaranteed 2 hour response to enquiries marked as urgent, and will entitle your Trust or School to bespoke training at least twice per year.

PLATINUM LEGAL SUPPORT

Our legal support package covers all other legal requirements your Trust or School might have save for property transactions or where a formal dispute has arisen. Common examples include advice and support provided to Headteachers and Governors in relation to complaints from parents, exclusions, reviewing contracts for the supply of goods or services (including negotiating better terms and/or exits from contracts for items such as photocopiers), GDPR, handling SARs and requests under the Freedom of Information Act, advising on data breaches, support relating to access to pupil records and parental responsibility,

safeguarding issues, interpretation of DfE Guidance and producing Lease Reports if required.

HR PLUS

Our HR Plus package is designed for Trusts and Schools who require a lower level of support but still want to know they have the benefit of fixed fee advice they can call on throughout each term. The advice is capped at 5 hours per term (which may well be more than enough if you do not regularly require support) and does not include strategic support or project management, but will cover all day to day support including handling disciplinaries and, grievances, managing long-term absence, handling flexible working requests, advice relating to entitlements and varying terms and conditions in addition to supporting you through any redundancy or restructuring projects. If you require support over and above the 5 hours, we will offer the support at reduced hourly rates.

LEGAL PLUS

Our Legal Plus package is limited to 2 hours support per term for non-staffing matters which may well be more than enough support for the likes of GDPR, parental complaints, exclusions, parental responsibility etc.



ABOUT THE SCHOOLS SUPPORT SERVICE

We are the region's local education experts boasting a client base of more than 100 Schools throughout Devon and Cornwall. Our clients range from some of the largest MATs to individual primary Schools all of whom have chosen Wolferstans to provide their ongoing HR and/or legal support because of our pragmatic solutions based approach which is delivered at an affordable and cost effective price.

Our team includes education specialists dedicated to providing on-going support to Schools meaning they understand the unique quirks of the education sector. Providing daily support of this nature means our specialists are familiar with the STPCD, Burgundy Book, PCC, CCC and DCC existing template policies and the freedoms which are now available to academies.

OUR APPROACH

The advice we offer is pragmatic, we put ourselves in your shoes and offer advice that is the best for the School as a whole, not just to comply with legal obligations. Each of our Schools/MATs are allocated a solicitor specialising in education who will act as the key contact. The key contact will be supported by other members of the team, but it will be the key contact who will form close links with the Business Manager, Headteacher and to some extent the Governing Body so that they become familiar with your School's approach and ethos.

We offer a solutions based approach which routinely means identifying the School's objective/preferred outcome, analysing the issues, assessing the risks, presenting different options (which will vary dependant upon the School's attitude to risk/cost in a given situation) and then helping the Business Manager or Head to resolve the issue. This usually entails telephone consultations, exchange of emails, followed by drafting and approving letters. If a face to face meeting is required we are in a position to visit your School at short notice.

OUR OFFERING

Our packages for HR and/or Legal Services offer Schools a fresh alternative to services offered by the Local Authority and national providers. Signing up to our packages will grant your School or Trust unlimited access to our team of specialist education solicitors who will be available for immediate telephone advice and appointments at the School as and when required.

We understand the importance of prompt advice and are committed to returning urgent emails and/or calls within two hours within our platinum packages. The packages will provide peace of mind in that you will know that for a fixed fee you will receive unlimited support from education specialists. The Schools support team are experienced at dealing with the challenges Schools are likely to face such as handling long term absence and progression to capability, negotiations and consultations with unions, advising on exclusions, complaints and parent's rights to educational records. There are

no upper limits in terms of usage within our platinum offerings – our quotations are based upon our experience in the sector and knowledge of what is ordinarily required for a School or Trust of a comparable size. The only exclusions i.e. occasions where you will have to pay us something extra are when a claim is issued, a formal dispute has arisen,

redundancy or TUPE exercises involving 20 or more employees, industrial action and property transactions such as the granting of a new lease or support in relation to converting, joining and/or expanding a MAT.



Key Contacts



James Twine
HEAD OF EDUCATION SCHOOL
SUPPORT TEAM

James heads up the Education Department at Wolverstans, he is a dedicated employment and education law specialist whom provides ongoing legal and HR advice to support the day to day running of Schools and Trusts. He is well known for forming strong relationships with Headteachers and Business Managers and has a reputation for delivering pragmatic strategic advice to Schools throughout Devon and Cornwall. James has extensive experience of managing projects for Schools and Trusts including large redundancies, the removal of underperforming senior individuals and Trade Union relations. James also sits on the board of the Cornwall Association of Primary Heads (CAPH).



Victoria Sargeant
HEAD OF EDUCATION AND
EMPLOYMENT

Victoria is an Employment and Education Solicitor who provides support and legal guidance to Schools across the region. Victoria specialises in education and its unique employment issues. She has experience of dealing with union representatives and union consultations and provides strategic legal advice on both staffing and educational issues. Victoria has an excellent track record in successfully representing Schools at the Special Educational Needs and Disability Tribunals and sits as the Chair of a Local Governing Advisory Board. She is also a HR committee member for a large local MAT and is also a board member of the Cornwall Association of Primary Heads (CAPH).

"We have been working with Wolverstans for a number of years and it is a perfect solution for our MAT. James and Victoria have supported through a range of HR and legal issues such as absences, capability, restructures, redundancies, disciplinaries etc as well as GDPR which included staff training. They are always quick to respond and their support and expertise gives us confidence and peace of mind. I would highly recommend them to others and great value for money."

Anna Pearce, Business Operations Manager at Horizon



Steph Marsh
SOLICITOR

Steph is an Employment Solicitor and education law specialist who advises Schools and Academy Trusts on a wide range of legal issues. Her expertise includes assisting Academies with conversions as well as Significant Change applications, including age-range changes and increasing the pupil capacity. Steph has significant experience assisting both Schools and Academy Trusts with Subject Access

Requests as well as Freedom of Information requests. She provides tailored and practical legal advice on staffing and general legal issues as well as advising on the day to day running of education facilities. Steph has experience in advising on disability discrimination, redundancy situations, unlawful deductions from wages claims and data protection law.



Mara Cunha
PARALEGAL

Mara is Paralegal within the Employment and Education department, who provides day to day support to the team and is on hand to take enquiries, provide HR and legal advice whilst focusing on client care to ensure all their needs are met.



Julian Burrows
ASSOCIATE SOLICITOR

Julian specialises in advising Schools and Trusts on responding to Subject Access Requests and requests under the Freedom of Information Act. He is a Senior Associate within the firm's Disputes team. He advises on contentious matters within the education setting including breach of contract and negligence claims, as well as advising on GDPR issues.

"I cannot thank Steph and her team enough for their understanding and support during this process. All my questions were answered with care and in a way that I was able to understand and the matter resolved as quickly as it could have been. We have used Wolferstans before for the sale of our property and will look to them again should we ever need to."

Service Offered

The HR AND EMPLOYMENT LAW SUPPORT services entitle your Trust or School to unlimited access (telephone, e-mail and virtual meetings) to our specialist schools support team in relation to any staffing matters. The majority of support tends to relate to disciplinary and grievances, performance management and capability, managing long term absence, handling flexible working requests and advice relating to entitlements/terms and conditions.

However, subscription to the platinum package also entitles your Trust or School to strategic support when it comes to those complex and more difficult projects such as restructures and redundancies or the removal of senior individuals. Typically, strategic support would include a face to face meeting with the Headteacher (and governors if you wish) where we ensure

the process, timescales, costs and next steps are fully understood in addition to help with drafting the business case/plan and union consultation.

The Legal Support service covers all other legal requirements your Trust or School might have save for property transactions or where a formal dispute has arisen. Common examples include advice and support to Headteachers and governors in relation to complaints from parents, exclusions, reviewing contracts for the supply of goods of services (including negotiating better terms and/or exits from contracts for items such as photocopiers), GDPR, handling SARs and requests under the Freedom of Information Act, support relating to access to pupil records and parental responsibility, safeguarding issues, interpretation of DfE Guidance and producing Lease Reports.

Summary of Work Required	Platinum HR and Legal	HR and Legal Plus	Edu-call
Initial "MOT" (by way of questionnaire)	✓	✓	✓
Face-to-face meetings	✓	✗	✗
Audit of existing contracts of employment	✓	✓	✗
Audit of existing policies	✓	✓	✗
Provision of Template Policies	Provision of our suite of no red-tape policies which we will help tailor to meet your school/Trust's needs.	Provision of our suite of no red-tape policies which we will help tailor to meet your school/Trust's needs.	Provision of our suite of no red-tape policies.

Summary of Work Required	Platinum HR and Legal	HR and Legal Plus	Edu-call
Advice and Support	Unlimited virtual meetings, telephone and email support in addition to unlimited templates, documents and drafting support.	Up to 5 hours of advice/ support per term to include virtual meetings, telephone and email support in addition to templates, documents and drafting support.	Telephone and email support only. Support limited to a maximum of 30 minutes per query.
Designated Solicitor	✓	✗	✗
Availability	Support available during evenings and weekends as well as normal office hours.	Support available from 09:00 – 17:30	Support available from 09:00 – 17:30
Follow up with written advice if requested	✓	✓	✗
Access to template letters and documents	✓	✓	✗
Settlement Agreements	Unlimited bespoke drafting of settlement agreements and negotiation with trade union representatives.	Provision of template settlement agreement.	✗
Early Conciliation with ACAS/pre-claim correspondence with solicitors or an employee either before they have left or afterwards	✓	✗	✗
Strategic consultancy and project management for redundancies and TUPE transfers (19 employees or under)	✓	✗	✗
Representation at Consultation Meetings and Negotiation with Trade Unions	✓	✗	✗

Summary of Work Required	Platinum HR and Legal	HR and Legal Plus	Edu-call
Briefings to Panels or Decision Makers prior to dismissal, appeal and grievance hearings	✓	✗	✗
Regular e-shots on Employment Law and DfE updates Quarterly newsletter	✓	✓	✓
Bespoke Training Sessions	✓	✗	✗
Termly review meeting at your offices (or virtually depending upon proximity)	✓	✗	✗
6 monthly virtual review meeting/ telephone conference	✗	✓	✗
Secure portal with designated password	✓	✗	✗
2 hour turnaround for urgent queries	✓	✗	✗
10% discount on any school/trust property transactions, re-brokerages or conversions	✓	✗	✗
Service Level Guarantee – 10% reduction in our fees if our service does not meet your expectations	✓	✓	✓

HR and Legal Support		
Service	What We Provide	Cost
Platinum HR and Legal	Platinum HR and legal services listed above	£28 per employee
HR and Legal Plus	HR and Legal Plus services listed above	£20 per employee
Edu-call	Edu-call includes the HR and Legal services listed above	£5 per employee



HR or Legal Support		
Service	What We Provide	Cost
Platinum HR	Platinum HR services listed above	£20 per employee
HR Plus	HR Plus services listed above	£15 per employee
Platinum Legal	Platinum legal services listed above	£12 per employee
Legal Plus	Legal Plus services listed above	£6 per employee

Service Level Guarantee

If you do not consider that you have had exceptional services from us for our work under any of the Platinum HR, HR Plus or Edu-call services, you may unilaterally reduce our fee by up to 20%. All we ask is that you only invoke this service in a fair and principled way and that you share with us your reasons and how we could improve our service. This applies to all services.

1 The **Platinum Services** include:

- 1.1 Use our advisors for all advice and work expected from an HR manager (not including attending hearings with employees (albeit we will brief the decision makers and ensure they are fully prepared for hearings) Payroll and administration, typing, formatting etc).
- 1.2 Unlimited virtual meetings and as many telephone conferences, emails, letters, documents as you need to provide the service.
- 1.3 Save in exceptional circumstances, we usually respond to correspondence and telephone enquiries on the same day that they are received and within and 2 hours for urgent queries – if you wish for an enquiry to dealt with urgently, please ensure you label the email "URGENT" in the subject header.
- 1.4 Access to your designated solicitor outside of normal working hours.
- 1.5 10% discount on any additional support received through Wolferstans.

2 The **HR and Legal Plus Service** includes:

- 2.1 An initial attendance or meeting at your office (or virtual meeting subject to proximity) or telephone attendance to discuss your likely requirements and any specific projects on the horizon.

- 2.2 Up to 5 hours HR/employment law advice per term and 2 hours advice per term for Legal advice. Access to the service between 9.00am and 5.00pm on week-days other than Bank Holidays.
 - 2.3 Save in exceptional circumstances, we usual respond to enquiries on the same day that they are received.
 - 2.4 10% discount on any additional support required whether that is HR/ Employment law or other areas of law offered by Wolferstans.
- 3 The **HR and Legal Plus Service** does not include:
- 3.1 Face to face meetings unless expressly agreed as part of the contract other than the initial meeting or telephone conference.
 - 3.2 Time spent on work outside the scope of the HR and Legal Plus Service will be charged at an hourly rate that will depend on the nature of the additional work involved unless we are able to agree an alternative pricing structure with you.
- 4 The **Edu-call Service** includes:
- 4.1 A first telephone call or virtual meeting to discuss your likely requirements.
 - 4.2 Availability to the service only between 9.00am and 5.00pm on weekdays other than Bank holidays.
 - 4.3 Save in exceptional circumstances, we usually respond to enquiries on the same day that they are received.
 - 4.4 10% discount on any additional support required whether that is HR/ Employment law or other areas of law offered by Wolferstans.
- 5 The **Edu-call Service** does not include:
- 5.1 Time spent on work outside the scope of the Edu-call Service, which will be charged at an hourly rate unless we are able to agree an alternative pricing structure with you which will depend on the nature of the additional work involved.

Exclusions

The following are expressly excluded from the service offered under our packages:-

- Disbursements;
- Collective consultation or establishing works councils;
- Recognition processes by trade unions;
- Industrial action;
- Pensions; and
- Health and safety rules or obligations;
- TUPE transfers involving 20 or more employees;
- Redundancy exercises involving 20 or more employees;
- Payroll;
- Claims and formal disputes;
- Property Transactions such as lease renewals and academy re-brokerages
- Redrafting or negotiating legal contracts;

- Updating and reviewing corporate documents including Articles, MFAs, SFAs;

If applicable, we will price these and any other requirements separately for you at discounted hourly rates.

Explanatory Notes

Hourly Rate

- **Advantages**

- If the project proceeds smoothly and without departure from the agreed scope, exclusions and assumptions (outlined in the Summary of Work), it may come in cheaper than other pricing options;
- You have the ability to monitor cost issues on an on-going basis and refine your instructions in response to those developments;
- We will manage your costs as best we can and will keep detailed and accurate time records; and
- We will not increase our fee beyond the billable time we record.

- **Risks**

- The costs may end up higher than under other pricing options;
- There may be little proportionality between the total fee and the result you achieve. Under this option, we will not discount our fee for a result that falls short of your expectation if that result is something we did not have any control over; and
- Ultimately you will not have certainty about the costs until the work is complete.

Fixed Fee

- **Advantages**

- You have complete budgetary predictability and certainty within the scope, assumptions and exclusions;
- There will never be any pricing surprise. Most of the cost risk sits with us; and
- If unforeseen work is required which falls within the agreed service, our fee will not increase and we will absorb the additional cost.

- **Risks:**

- This option does not completely remove all of the cost risk for you;
- If there is a departure from the scope, assumptions and exclusions set out above it is likely that our fee will need to be adjusted upwards. However, we undertake to discuss it with you as soon as we become aware of the possibility; and
- Under a fixed fee arrangement, you might end up paying more than you might have under an hourly rate basis or any other arrangement, but the agreed fixed fee will not be discounted.

Contact Us

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www.wolferstans.com

We can discuss with you how best to plan ahead in order to achieve your wishes. With appropriate and specialist help from our highly qualified solicitors, it is possible to put your mind at rest knowing that everything is in order.

OUTSTANDING LEGAL KNOWLEDGE WITH CONFIDENCE



This leaflet is for general guidance purposes only. Your solicitor will be able to provide specific advice based on your circumstances. Wolferstans has taken all reasonable care to ensure this leaflet was accurate on the date of publication.

