

Primary Partnerships
Handbook



making physics matter

**The Ogden Trust
Primary Science Team**
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Ogden Primary Team

The principal members of staff involved in running the Primary Partnership Programme are:

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Introduction

The purpose of this document is to bring together the various strands of information, advice, offers and expectations that have emerged during the development of The Ogden Trust's Primary Partnership programme since 2014.

Good communication is essential within each partnership and also between the partnership co-ordinator and the Trust. We require bids to be put together for future funding that demonstrate cooperation between members of the partnership and critical reflection on what went before. We also require end-of-year reporting, both in terms of activities, outcome and financial accountability.

Finally, we are here to support you. If you have never been asked to report to us in a particular way, including the specific information we require, and you haven't collected it, we do not expect you to be able to submit it! However, you can complete the reporting forms as best you can with the information you have and take note of what is required for any subsequent years' funding. Please ask us if you are unclear about what you should do; there are nuances between partnerships – we recognise this – and we are happy to provide you with advice for your individual circumstances.

Wendy Cox

National Lead, Primary Science

What is an Ogden Primary Partnership?

An Ogden Primary Partnership is a group of schools within a local area who want to collaborate on projects that enhance the teaching and learning of primary physics. Each partnership will differ slightly in its make-up but there is often a link to a local university through an Ogden Science Officer.

The Ogden Trust provides funding to the partnerships over a typical period of four years. More details about the funding model can be found on page 6.

Aims of Ogden Schools Science Partnerships

The aims of the Partnerships Programme are:

- To raise the profile of, and improve pupils' enjoyment, progress and attainment in primary science
- To enhance teachers' confidence in planning, teaching and assessment of primary science
- To form collaborative partnerships facilitating the continued sharing of best practice

By working together, sharing ideas and best practice, schools find that they increase the profile of physics within their schools, raise aspirations among their pupils and reinvigorate the teaching staff. Funding from The Ogden Trust obviously helps but successful partnerships find that there is much to be gained from the momentum of good collaboration and that many activities can be run at relatively low cost.

What might an Established Partnership be offering?

Partnerships should be working towards including a range of activities from the following list:

- Termly meetings of teachers and other interested parties, where good practice can be shared
- CPD for teachers
- Visits to museums and places/events of interest
- Student-inspiring events such as speakers and science shows
- Outreach events for other schools, the general public, parents
- Primary Science Assistants and Physics Prize-winners

Organisation and Leadership of a Partnership

Schools in a primary partnership are required to nominate one school as the 'hub' school and one person (preferably from the hub) as the Partnership Co-ordinator. It is also necessary for the Ogden funding to be accounted for separately so it is useful for the hub school's finance administrator to be involved so that s/he can devise a method to identify and keep track of the Ogden expenditure.

Hub School

The hub school is the school to which the Ogden funding is sent. It needs to be able to generate invoices and pay bills on behalf of the partnership. Partnership monies and receipts and invoices related to primary partnership purchases need to be kept separate from other school funds so that an annual reconciliation can be made to The Ogden Trust.

Partnership Co-ordinator

The Partnership Co-ordinator is the Trust's point of contact for the partnership and should, ideally, be located at the hub school. The Trust does not normally correspond individually with other teachers or members of staff in the partnership. The co-ordinator's special role is to organise, set the agenda and chair partnership meetings and to submit, on behalf of the partnership, bids for funding, annual reports and accounts. Co-ordinators should submit minutes of partnership meetings to the Trust but may find it useful if someone other than themselves takes the minutes.

Circulation of minutes: we recommend that minutes are circulated to attendees, absentee partnership members, Head Teachers, the Ogden Consultant or Science Officer associated with the partnership (if that applies) and The Ogden Trust.

Securing the Buy-in of Senior Management

The Ogden Trust wants the management teams of schools in partnerships to be positive and supportive about the partnership. If it would help for the Trust to send a letter to your schools' senior management, informing them about the partnership, its benefits, your respective roles in it and the expectations we have of each school, please let us have the name and job title of the addressee.

Teacher Fellowship

Some partnerships are offered a Teacher Fellowship after one year, the individual appointed usually being at the hub school and often, but not always, the existing Partnership Co-ordinator. Teacher Fellowships are part-funded by The Ogden Trust to deliver and administer outreach work alongside their teaching post. Ogden Teacher Fellowships are not restricted to Ogden partnership schools; the Trust funds outreach and project work at other schools through this mechanism. Teacher Fellowships are by invitation only.

Admitting or Removing Partnership Schools

Once a partnership has been created, The Ogden Trust generally leaves it to the partnership to admit new member schools or remove inactive schools from their number. The co-ordinator should inform the Trust about any changes. Occasionally the Trust will ask a partnership to consider a particular school that would like to join.

What will a Partnership receive from The Ogden Trust?

Funding Model

Funding is agreed normally for a period of four years subject to satisfactory participation in line with the stated objectives and spirit of the programme. As a guideline, a new partnership should normally expect to bid for up to £2,500 for the first three years and up to £1,000 in the fourth year. Although it is useful to set parameters to guide partnerships in their bid, our experience shows that partnerships vary greatly in their ambition, organisational ability, internal support from their school and access to other resources – these all affect the size of a partnership's bid. Some partnerships put on a wide variety of relatively simple but effective activities for very little cost; others prefer to host fewer but more complex events – we encourage partnerships to behave in the way that best suits their local needs, objectives and resources and to bid accordingly.

Communication between the Trust, Partnerships & Others

Good communication between the Partnership Co-ordinator and the Trust is essential for a partnership to be a success. Partnerships that have 'gone quiet', even when there may be excellent work taking place, are more difficult to assess for future funding or for when intervention or support may be required to address particular problems.

Partnership Meetings

The Ogden Trust expects partnerships to meet regularly, at least once a term; most partnerships meet about five times per academic year. Often other interested persons will attend partnership meetings, such as Ogden Consultants or Science Officers (see page 10). The Partnership Co-ordinator should let the office know the dates and locations of partnership meetings, in case someone can attend, and add us to the distribution list for minutes. We do like to visit partnerships in action from time to time to see what is happening and to meet the people involved in making them happen.

Generic Email Address

Every partnership has a partnership email in the format [name of partnership]@ogdentrust.com that is published electronically on the Trust's website and on paper in the Partnership Directory. These email addresses automatically forward to the co-ordinator's school or private email address (whichever they prefer). Very few emails come in this way, but it gives partnerships an easy way of getting in contact with other partnerships and, since they are published on the Trust's website, it reduces spam to the co-ordinator's school or personal email address.

Please note that when you reply to an email that has been directed to you via the @ogdentrust email address, your reply will be sent from your own email address.

Web Pages, Social Media and Newsletters

If you create a website for your partnership, use a specific page on the hub school's website or publish a partnership newsletter, please let us know. Many partnerships use twitter to advertise and comment on their partnership work and the Trust does take note of this activity and enjoys seeing photos. Do mention the Trust in your tweets (@ogdenprimary) if you have enough characters! Facebook and LinkedIn are currently used to a lesser extent by partnerships but the Trust has a Facebook page and a LinkedIn group which you can like or join if you find this useful. As a public forum, Facebook is useful to share successful activities you have done; the LinkedIn group is by admission only (via the office) and so provides a more private forum where, for example, Partnership Co-ordinators may like to consult each other for advice.



The Ogden Trust likes to keep its website up-to-date with news stories about initiatives and individuals that it supports. Sometimes these stories are picked up from twitter but Partnership Co-ordinators are encouraged to submit ideas for news stories directly to the Trust.

Partnership Directory

All partnerships and their activities, as well as the supporting network of Teacher Fellows, Ogden Consultants and University Science Officers, are summarised in the Ogden Partnership Directory. The names of all schools as well as the name of the co-ordinator together with the generic partnership email address are identified. There is an electronic and print version of the directory. Please let us know if you require any further copies for new teachers or similar.

The Ogden Database: Contacts of Teachers and Schools

At regular intervals, the Trust will ask you to confirm the member schools of your partnership and the teacher contacts so that we can update our database.

How we use teachers' data (email address):

- General administration in relation to the Trust
- Circulation of offers specific to partnership schools, such as free or subsidised access to science exhibitions, invitations to nominate pupils for special events or awards
- Circulation of information and offers of a relevant nature from third parties such as universities and science-related organisations

The Ogden Trust does not pass on email addresses to organisations or individuals outside The Ogden Trust. We are happy to take the email address of individual teachers off the database if they request so.

Ogden Support Network

The Trust tries to avoid being too prescriptive in the activities that partnerships run and how they manage their administration on the ground. It prefers to encourage independence and innovation. It is keen to provide support where necessary, however, and there is a network of people who can help and a selection of published resources. Starting a partnership may seem like a daunting task, and it undoubtedly requires a lot of commitment from the teachers who run it, but there is no need to reinvent the wheel – there are many tried and tested ideas which you can access and adapt to your own circumstances.

Ogden Primary Staff

Staff contact details are listed at the end of the Table of Contents. The principal contacts for administration are Kirstin and Erica, who can usually help you or direct you to the right person.

Ogden Consultants

The Ogden Consultants work for the Trust on a freelance basis and are based around the country. Most of them have a background in teaching but some may have additional or other skills. They use their experience and expertise to support new partnerships during the initial stages, or provide specialist support in areas such as CPD, primary school science and university access, or offer special events. Their contact emails can be found on the Trust's website and co-ordinators are actively encouraged to get in touch with them.

Ogden Science Officers (OSOs)

Ogden University Science Officers are employed by university science outreach departments and their posts are part-funded by The Ogden Trust. As such they are delighted to organise or deliver physics outreach work to partnership schools (both secondary and primary) and co-ordinators are actively encouraged to get in contact with any Science Officer that is geographically close to them to discuss what they might find useful. The contacts can be found on the Trust's website.

Some Science Officers run a regional Schools Physicist of the Year Awards (A-Level) and Year 6 Scientist of the Year awards and may invite partnership schools to nominate students.

Teaching Resources Website

The Ogden Trust Partnerships Programme's philosophy is to share and spread good practice as widely as possible. Therefore, we have created a section on our website dedicated to teaching resources that can be copied and adapted by other schools. Any partnership school can submit something to the collection (via the office) and any school (whether Ogden-related or not) can access the collection. Resources are indexed according to topic, intended audience and type of activity – do take a look and give us any feedback that you think might be useful.

<http://www.ogdentrust.com/primary-science/primary-resources>

Teachers of the Future

The Ogden Trust is eager to encourage young people to consider a career in (physics) teaching and this is supported by partnership schools in a number of ways even at primary level!

Primary Science Assistants

Some primary partnerships appoint 'Primary Science Assistants' from their Year 6 pupils to assist with creating science displays, setting up equipment and materials for science lessons and clubs, and answering questions from younger children.

Science Ambassadors

A number of secondary partnerships train A-level physics students to go into feeder primary schools to assist in science lessons or to run extra-curricular activities. This can be a valuable resource for primary partnerships, it is helpful to a primary teacher who may need support in their subject knowledge of a particular primary physics topic and also provides the A-level students with transferable skills, increased confidence and a first insight into what teaching might be like as a possible career. Look at the Partnership Directory to see if a school in your area is running this scheme.

How to Bid for and Receive your Funding

Partnerships are required to put together an annual bid for funding via a standard template rather than receiving an automatic payment each year. Schools in the partnership should meet and plan the activities for the coming year and specify the expected costs. Bids will be reviewed by Kirstin and any questions or suggestions arising from them will be discussed with the individual Partnership Co-ordinator until an agreement is reached. That agreement – including any conditions that must be met – is summarised in a Grant Award Form which will be sent to the Partnership Co-ordinator for signature. Do not be too concerned if you have to change your plans part way through the year for which a bid was approved. We understand that things happen which make this necessary sometimes. Just keep us informed and we will support you in the most sensible way possible.

Typical Timeline for the Bidding Process¹

In this table, the term 'Funds Needed' refers to the date by which funds are required by the partnership, i.e. if the first activity on the bid needs resources purchased in advance, then the partnership needs to take that into account when working out its own timetable for submitting its bid.

¹ This represents what we would like to aim for. What actually happens depends on a number of factors including the quality of the bid, the availability of the Partnership Co-ordinator to respond to questions (please bear in mind where the school holidays fall), the speed with which the hub school can issue an invoice and the date on which the invoice arrives at the office (The Ogden Trust processes invoices in batches on a monthly basis).

<i>What is required/ what will happen</i>
Bid submitted to office
Bid is reviewed by Kirstin and Wendy and any matters arising discussed with Partnership Co-ordinator
Two copies of Grant Award Form are issued by office for signature – one for Partnership Co-ordinator to keep and one to return to the Trust
Hub school issues an invoice to the Trust
Trust processes invoice – cheque issued to hub school usually two weeks later

Please keep in mind:

The Ogden Trust will only pay partnership funding to a school after we have received:

- an agreed bid
- (for partnerships in their second year and older) a report for the previous year
- an invoice
- a list of member schools and contacts

Therefore, it is essential for you to consider the timeframe when planning your reporting, bidding and timing of first events in the year.

Bid Template

A blank bid template is available to download from our website. A sample completed one can be found at the end of this handbook (Appendix A). Please complete all sections, not forgetting those outlined in red at the top. There are accompanying guidelines on a separate sheet of the spreadsheet. Please refer to these so you are clear about what may be included and what should not, bearing in mind the emphasis should be on **physics** activities.

These are examples of costs you may incur that would typically be funded from The Ogden Trust grant:

- Coaches
- Fees for speakers
- Entrance fees
- Subscriptions
- Light refreshments (e.g. for students during events, for teachers during partnership meetings)
- Materials (copies, screws, tubes...)
- Prizes, awards (for achievement and progress, not simply participation; at the discretion of the Trust)
- Science shows
- Equipment (usually not core-curriculum, which we would expect schools to provide anyway, though if that is required, we would like to understand why; in all cases of equipment purchase, explain its use and why one school needs it as opposed to another)

Financial Administration

For ease of communication, it is helpful if the Trust is provided with the name, job title, phone number and email address of the person at the hub school who will be responsible for reconciling the Ogden Trust grant against spending. This person will also be expected to send invoices to the Trust once the Grant Award Form has been signed by both parties. Some schools are better equipped than others to deal with financial accountability of this nature and we aim to make it as straight forward as possible. Since it may come as news to your school administrator/ finance officer that s/he is a crucial part of the hub school's relationship with the Trust, Appendix B shows a copy of a letter specifically addressed to that person so that they understand their role and their importance. Appendices C and D contain a sample invoice and a sample reconciliation sheet that s/he may find useful. We will send these to the appropriate person on receipt of their contact details.

Reporting and Accountability to the Trust

The Ogden Trust expects an annual report from each partnership. It is interested in reports that demonstrate a constructive, qualitative assessment of partnership activities so that we (and you) can learn from them and continue to improve the programme. We want our partnerships to succeed and develop within their own time-frame so that they are in a better position to continue their work after the Ogden funding period has ceased. Partnerships who can demonstrate tangible benefits from the strength of partnership work will be in a stronger position to attract funding from other sources or from within school budgets. The Trust is better able to advise other partnerships on the relative merits of certain activities they include their bids if it has comprehensive reports of similar activities on which to draw.

Content of Report

The report should give us a complete overview of the partnership's activities. It should include, therefore, activities that were led by a paid Ogden Teacher Fellow, Science Officer or Consultant, activities that did not incur any costs or those that were funded by third parties.

The report is in 5 sections and an Excel template can be downloaded from our website (sample not included with this document as it doesn't 'print' well and is designed to be viewed on screen). Each section of the report is on a separate sheet. If the Partnership Co-ordinator keeps records of partnership activity in a different but very similar manner, it may be possible to submit the report in that format, but do check with the office first.

A full description of what is required appears on the template on the 'Guidance Notes' sheet but in summary:

Part I: Confirmation of partnership member schools and contacts

This will help us keep our database up-to-date.

Part II: Summary and Reflection

This section can be used to summarise particular strengths and challenges, set objectives for the following year and provide feedback to The Ogden Trust.

Part III: Activities and Events/Equipment/Contribution to Resources website

We are interested in seeing how well the partnership funding is serving the whole group, whether it is spent on activities, CPD or equipment. This section should reflect not just the numbers participating and the target audience, but also how the responsibilities of organisation fell among

the member schools. It should include reflection on the relative success of activities compared to their aims and the time spent on them and whether or not they were value for money.

Part IV: Financial Report

Costs should be grouped per activity/event and correlate with original bid so that we can see if there was an over or underspend on any planned activity and identify why.

Part V: Copy for Partnership Directory

While the activities are fresh in the co-ordinator's mind, this is a good time to write a brief update (up to 200 words) about the partnership for publication in the next edition of the Partnership Directory.

Submission of Report

The Trust expects one report per year towards the end of its funding year. This may mean that the report is necessarily compiled before all activities for the year have been completed. This is acceptable as long as the majority of activities have taken place and the remaining ones are shown on the report. A partnership year is determined initially by when it was first created. However, it may become apparent during that first year that the timing does not work well within your school structure. If you would like to change the timing of your funding, do discuss your individual circumstances with us – there is certainly some advantage to the Trust in not having everything come in at once so that we can manage our own workload.

It is very useful if the report can be submitted at the same time as the bid for the following year's funding. This allows us to see how you have incorporated the lessons learned from your year's activities into the plan for the following year.

The report will be reviewed by Kirstin and any further queries addressed to the Partnership Co-ordinator. A selection of reports may be circulated to the Trustees and some may be used as the basis for case studies either on the Trust's website or in its publications.

End of Ogden Partnership Funding

Ogden partnership funding does have a natural life span and we encourage partnerships to think beyond that time. Partnerships may find that some activities can be run for little or no cost and may decide to keep running them – the Resources section of our website is useful for getting ideas. The benefits reaped from partnership work may be recognised as so valuable by senior management that schools decide to invest some of their own funds in their continuation, or the good results are useful to broker funding from another source.

Natural Conclusion

As the end of the funding period approaches, we will get in touch with the Partnership Co-ordinator to confirm the end date and agree a deadline for submission of the final reports. Some partnerships may be offered a limited extension for a smaller sum in order to complete a specific project or programme.

Enforced Closure

Withdrawal of partnership funding part-way through a four-year period is unlikely but is possible if a partnership becomes incapable of organising itself for whatever reason. This may be down to staff changes or other circumstances at the hub school or in the local area which were not apparent at the time the partnership was set up. It is best if the Trust is made aware of any situations that arise which may have a detrimental effect on the partnership activity as soon as possible. It may be that we decide to suspend the funding for a year until the circumstances become more favourable – do discuss this with us. Partnerships that never communicate with us are also in danger of having their funding stopped or suspended, even if they are doing very good work. There are plenty of ways to tell us about that good work so please do not leave us to guess.

Feedback

We would welcome feedback from you as to how we can better administer the programme and support your needs. Each partnership is different and we try to take a flexible approach but there is a certain amount of standardisation that is necessary for us to be able to handle the workload in the office. If you have any suggestions, comments about this handbook or specific observations from your own partnership experience that you think may be relevant elsewhere, please let Kirstin know.

Appendices

On the following pages, you will find:

- A. Bid Template (completed with a fictitious example)
- B. Letter to school Finance Officer
- C. Sample invoice
- D. Accounts Reconciliation Template

The templates are all available to download from the Trust's website in the Downloads section and are the preferred method of submission. <http://www.ogdentrust.com/downloads>

Name of Partnership:

Ogden Sample Partnership Bid

Bid prepared by:

A. Teacher

Date: May 2014

Bid for period:

Start (MM/YY)

Sept 2014

to

End (MM/YY)

Aug 2015



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Activity	Date	Audience (include Year Group)	Organising Staff	Schools Involved	Description of Activity	Cost source	Total Cost
Four partnership meetings	tbc (1 in autumn & spring terms and 2 in summer)	PC, Heads of Physics, Headteacher from Hub school	ID	All 5 in partnership	Feedback from previous term's activities; planning meeting for coming term; looking further ahead	Refreshments	£ 20.00
CPD (electricity) for teachers in primary feeder schools	21-22/10/2014	Primary Science Coordinators	PJ/TW & 6FSA	12 feeder primary schools plus 'School A' and 'School B' from partnership	Two 3-hour sessions per day with 3 primary schools attending each session Staff cover provided by the schools.	Resource boxes (£75 each); Refreshments; Travel expenses (£150)	£ 1,110.00
Science Show (at 'School C')	16/12/2014	Year 9s	JJ	All 5 in partnership	Visiting 'live' show with audience participation - complements physics curriculum	Science show (£950); subsidy for coaches	£ 1,190.00
GCSE Science clubs	Weekly after February half term (pilot)	GCSE physics candidates (may extend to double science after pilot)	GH/IS/AF/YW/PV	All 5 in partnership	Each school runs 5 weeks of topic-based club; physics teacher from each school leads the topic and rotates round schools	Teacher travel; Resources	£ 200.00
6FSA presentations	12/03/2015	Year 7s	TW	'School B' and 'School D'	A2-level student science ambassadors make presentations about their work to younger pupils		
Prize-giving	Beginning of summer term - different date at each school	Year 11 & Year 13 plus their parents	ID/TW	All 5 in partnership	Physics prizes to most promising/inspiring GCSE and A-level physics candidates that year plus awards ceremony for prize-winners, their guests and attending staff - about 60 people - SEE NOTES	Book tokens; refreshments	£ 350.00
CPD for technicians	04/05/2015	Technicians	PV	All schools - at 'School E'	A telescope has recently been purchased at 'School E' which they are willing to loan to other partnership schools as long as technicians are trained in how to use it. 2-hour session	Travel expenses	£ 30.00
Trip to space exhibition at museum	03/07/2015	Year 8s	JJ/YW	'School C' and 'School D'		Coaches	£ 800.00
Science Fun on Transition Day	14/07/2015	Years 6s coming up to secondary school next term; Year 10s to lead	TW	'School B'	2-hour session for run by Y10 physics students as part of Transition Day - SEE NOTES	Resources	£ 60.00
University & careers in science event - to be confirmed		Year 9s and their parents	AF		We're looking at putting on an evening event for year 9s choosing their GCSE options and their parents with visiting university lecturer - possibly in January. Details and costs to follow but in the region of £350		£ 350.00

Abbreviations Key	
PC	Partnership Coordinator
ID/JJ/TW/PV	Specific teachers
GH/IS/AF/YW	Specific teachers
CPD	Continuous professional development
6FSA	6th form science ambassadors
OT	Ogden Trust

Additional notes
 10 x £25 Ogden Book Tokens requested in lieu of money, please.

May we have some giveaways to make up some goody bags to thank the Year 10 leaders of the Fun Science Transition Day, please? Enough for 20 students. And 120 stickers for the Year 6s.

The Ogden Trust wants to gain a complete understanding of partnership activity, regardless of cost.

Please include the following:

1. activities that do NOT incur any costs
2. activities that are funded by a third party
3. the costs of staff cover owing to CPD training
4. activities that are led by an Ogden Teacher Fellow

***eligible Teacher Fellow costs:**

Only include the cost of materials, refreshments, prizes, entrance fees and student travel in activities led by an Ogden Teach Fellow. Do not include the Teacher Fellow time or travel expenses as these are intrinsic to the Teacher Fellow's grant.

Please do not include the following:

1. teachers' time or travel expenses to partnerships meeting (The Ogden Trust expects this to be covered by the schools as a sign of commitment to the partnership).
2. costs of supply cover for teachers at partnerships meetings or events (except CPD, as stated above)
3. engineering activities; exceptions will be made only if there is a strong link to materials science
4. funding for CERN trips - this is awarded and administer separately

Please remember to complete the Abbreviations key.

These are examples of costs you may incur that would typically be funded from The Ogden Trust grant:

- Coaches
- Fees for speakers
- Entrance fees
- Light refreshments (e.g. for students during events, for teachers during partnership meetings)
- Equipment (usually not core-curriculum, which we would expect schools to provide anyway, though if that is required, we would like to understand why; in all cases of equipment purchase, explain its use and why one school needs it as opposed to another)
- Materials (copies, screws, tubes...)
- Prizes, awards (for achievement and progress, not simply participation)
- Science shows
- Expenses to attend the Ogden Rugby Partnership meeting (for co-ordinators who do not hold a Teacher Fellowship)

APPENDIX B



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Ridgeway Academy
Telephone: 01527 892867
Erica.dimeo@ogdentrust.com
www.ogdentrust.com

[Date]

Dear [Finance Officer]

The Ogden Trust has recently agreed a grant to a group of schools in your area (now known as the [state name] Partnership) to allow them to carry out enrichment activity in the teaching of physics. Grants of this nature are usually given for a period of four years. Your school has been selected as the Hub School for that partnership, which means that you will be the fund holder on behalf of its members. It also usually means that the person co-ordinating the partnership activities is someone at your school and they will be responsible for preparing the partnership's bid for future funding and for reporting on the activities of the previous year (the Partnership Co-ordinator).

There are three functions that we require the partnership finance officer to perform:

- 1. Generation of invoices to claim the Ogden funding (usually one per year)**
- 2. Payment of invoices from providers and other schools**
- 3. Producing an annual reconciliation of spending on Ogden partnership activities against original funding**

1. The Partnership Co-ordinator will prepare a bid for funding on behalf of the partnership which will be submitted to the Trust, reviewed, edited as necessary and eventually agreed. Once agreed, the Trust will issue a Grant Award Form for signature by the Trust and the Partnership Co-ordinator. To receive the funds, a fully signed copy of the Grant Award Form needs to be sent to the Trust office with an invoice for the agreed amount. The Trust batch processes its invoices at the end of the month so payment (which is by cheque) can take up to six weeks[#]. Please refrain from sending reminders before that period. If the payee name for the cheque is different from the name of the school, please make that clear on the invoice.

The Ogden Trust's primary finance administrator is Erica di Meo (who can be contacted on 01527 892867 or Erica.dimeo@ogdentrust.com).

2. Ogden funds must be accounted for separately and should not be added to either the school's or the science department's budget. Therefore, a separate accounting code, or other alternative method of identification, needs to be set up for exclusive use of partnership funding. At the end of the accounting period, the Trust needs to receive a financial reconciliation per partnership activity so that we can monitor the overall cost of events and the breakdown of costs per event. It is very helpful, therefore, if the reconciliation groups all costs relating to the same event or activity together. It is even more helpful if the

[#] As long as the school office/management is in agreement, the partnership may start spending the funding with the security of our signature on the Grant Award Form, before the funds arrive.

event or activity is listed under the same name that was used on the written report (which will be provided by the Partnership Co-ordinator).

Electronic copies of invoices for payments over £200 should also be forwarded to the Trust with the reconciliation.

If, during the lifetime of the partnership, another school becomes hub school, The Ogden Trust will ask the Finance Office for reconciliation of the account and advise to transfer the balance to the new hub school.

A sample invoice and a sample reconciliation sheet are attached for your information. If you have any further questions, please do not hesitate to contact me for help.

Yours sincerely

Erica di Meon

Business & Marketing

erica.dimeo@ogdentrust.com

01527 892867

APPENDIX C



Hub school address

INVOICE

Sharon Gibbons
Administrator
The Ogden Trust
Hughes Hall
Cambridge
CB1 2EW

Date
Invoice No:

[Name of partnership]
Ogden Trust Schools Science Partnership funding
(as confirmed via Grant Award Form)

Balance due £ XXXXX.XX

Payment terms:

The Ogden Trust pays invoices by cheque. Invoices are processed in batches at the end of each month and payments made in the two weeks that follow.

Ogden Trust Schools Science Partnerships Accounts Reconciliation Template



making physics matter

Name of Partnership:

APPENDIX D

Accounts prepared by:

Date:

Accounts for period:

Start (MM/YY)

to

End (MM/YY)

Income from The Ogden Trust	Date				
Brought forward from previous year	01/09/2012				£ 50.23
Partnership funding 2012/13	05/09/2012				£ 4,500.00
				Total Income	£ 4,550.23
Expenditure					
Activity/Event & Date	Invoice Date	Source of Cost	Additional Source of Income	Other income (contributions from schools, students etc)	
Trip to science museum	12/10/2012	coaches	Miller's School	£ 120.00	£ 400.00
05-Dec-12	05/11/2012	entrance			£ 200.00
Physics Olympiad	15/11/2012	materials <i>(please specify)</i>			£ 58.00
23-Nov-12		refreshments			£ 120.00
Dr Jones lecture	18/05/2013	coaches	Pupil contributions	£ 150.00	£ 500.00
12-Jun-13	01/06/2013	speaker fee			£ 300.00
	22/05/2013	refreshments			£ 80.00
Partnership meetings	12/10/2012	refreshments			£ 20.00
	15/01/2013	refreshments			£ 20.00
	16/05/2013	refreshments			£ 20.00
				Total Expenditure	£ 1,448.00
				Surplus/(Deficit) carried forwarded to next year	£ 3,102.23

Please complete the boxes with red borders and take note of the comments. Cells containing formulas are locked.