



Our Education Support Packages & PRICING OPTIONS

Unlimited Legal & HR Support

We offer various Legal & HR packages to suit your establishment's requirements. Providing peace of mind for the day to day running of your Trust or School and strategic support for bigger projects.

The packages we offer are:

PLATINUM HR & LEGAL SUPPORT

Looking for comprehensive and unlimited HR and legal support for your Trust or School? Look no further than our Platinum HR & Legal Support package.


With this package, you will have unlimited access to our specialist Schools support team via telephone, email, and virtual meetings for any staffing matters. Whether it's managing disciplinary and grievances, handling long-term absence or flexible working requests, or providing advice on entitlements and varying terms and conditions, our experienced team has got you covered.

Our Platinum package also includes strategic support and project management for complex and difficult projects such as restructures, redundancies, or the removal of senior individuals. We provide face-to-face meetings with the Headteacher and governors (if required) to ensure that the process, timescales, costs, and next

steps are fully understood, and we'll provide full support for any subsequent union consultation.

We pride ourselves on adding real value when it comes to tricky issues such as managing long-term absence and under performing staff. We will work with your School to ensure that OH reports are as useful as possible, providing tailored lists of questions that generally produce higher-standard reports. We will also advise you on protected conversations and conduct negotiations (usually with the member of staff's union representative) where necessary.

With our Platinum package, you get it all. This includes 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, and drafting/reviewing policies and contracts. Plus, you'll have access to our online Schools Policy Portal where you can download policies and other useful documents.

And that's not all. With our Platinum package, you'll also benefit from a guaranteed 2-hour response to urgent enquiries and bespoke training at least twice per year.

So why wait? Sign up for our Platinum HR & Legal Support package today and get the peace of mind that comes with having comprehensive and unlimited HR and legal support for your Trust or School.

HR & LEGAL PLUS

Our HR & Legal Plus package offers similar comprehensive support as our platinum package, but with a capped use of 7 (5 HR and 2 legal) hours per term.

This means that you still have access to fixed fee advice and support for all your day-to-day HR and legal needs, without the worry of unexpected costs. While our HR and Legal Plus package may have usage limits, you can be assured that our experienced team will provide you with high-quality advice and support that meets your requirements. And if you need additional support beyond the allocated hours, we offer reduced hourly rates to make it more affordable for you. So why not take advantage of our combined HR and Legal Plus package and get the peace of mind knowing that all your HR and legal needs are taken care of.

Covering everything from managing disciplinaries and grievances to handling flexible working requests and supporting you through any redundancy or restructuring projects.

Our Legal Plus package provides 2 hours of support per term for non-staffing matters such as GDPR, parental complaints, exclusions, and parental responsibility.

EDU-CALL

Our Edu-Call Plus package provides unlimited telephone and email support for any HR and employment law queries your School or Trust may have. Our specialist Schools support team will aim to resolve your query within 30 minutes. This package covers a range of issues such as performance management, sickness absence management, flexible working requests, disciplinary and grievance hearings, exclusions, GDPR and FOI requests, parental responsibility, and complaints from parents.

Should you require additional support beyond this package, you will receive 10% discount on any HR/employment law or other areas of law services provided by Wolferstans.

We understand that Schools and Trusts need fast, effective, and reliable support when it comes to HR and employment law issues but may not always require our platinum or plus services. That's why we offer the Edu-Call Plus package, to provide you with peace of mind and expert guidance throughout the academic year.

PLATINUM HR OR LEGAL SUPPORT

The perfect solution for Schools and Trusts looking for comprehensive HR or legal advice and support. These packages covers all HR or legal requirements that your school or trust may have, excluding

property transactions or formal disputes.

Our expert legal team can provide advice and support to Headteachers and Governors in relation to complaints from parents, exclusions, and contract reviews for the supply of goods or services. We can also assist with GDPR, handling SARs and requests under the Freedom of Information Act, data breaches, access to pupil records and parental responsibility, safeguarding issues, interpretation of DfE Guidance, and producing Lease Reports if required.

Choose our Platinum HR or Legal Support package and enjoy peace of mind knowing that you have access to top-quality legal advice and support whenever you need it.

HR OR LEGAL PLUS

Our HR or Legal Plus packages are 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 HR package 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.

This package covers 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.

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.

If you require support over the capped hours, we will offer the support at reduced hourly rates.

ABOUT OUR 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.

Your Key Contacts



James Twine
HEAD OF EDUCATION SCHOOL
SUPPORT TEAM

James heads up the Education Department at Wolferstans, 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
SCHOOL SUPPORT TEAM

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 are the preferred legal partner of both the Cornwall Association of Primary Heads (CAPH) with James Twine and Victoria Sargeant both sitting on the Board.





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
PARTNER, 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.

What Our Clients Say

"We have been working with Wolferstans 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

"After years of working with an established HR provider our Trust decided to make the move to a new provider, after a vigorous tendering process we selected Wolferstans. Within weeks of them starting work with the Trust we needed to tackle a number of very complicated cases. Wolferstans working with the Trust have been extremely supportive and provided swift and clear responses to all the scenarios each of these cases have raised. It is evident from our experience to date that they have tailored their service to meet the needs of the education sector."

Anonymous

What We Offer

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	£31 per employee
HR and Legal Plus	HR and Legal Plus services listed above	£22 per employee
Edu-call	Edu-call includes the HR and Legal services listed above	£6 per employee



HR or Legal Support		
Service	What We Provide	Cost
Platinum HR	Platinum HR services listed above	£22 per employee
HR Plus	HR Plus services listed above	£16.50 per employee
Platinum Legal	Platinum legal services listed above	£13.50 per employee
Legal Plus	Legal Plus services listed above	£7 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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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

Our clients rate us as excellent



4.9/5



reviewsolicitors



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.

