



THE ST. BART'S  
**ACADEMY**  
— TRUST —

# CHIEF EXECUTIVE OFFICER

## Vision Statement September 2017

[www.sbmat.org](http://www.sbmat.org)



# Our Values Are At The HEART Of Everything We Do





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# Mission Statement

The St. Bart's Multi-Academy Trust believes that education is preparation for life and we seek to prepare each child to face life beyond the School with confidence.

- **We aspire** to set high standards for personal behaviour and self-discipline, with courtesy, consideration and respect for other people of all ages, races and cultures.
- **We aim** to deliver exciting and quality learning experience in a safe, secure and happy environment.
- **We endeavour** to achieve high standards in every aspect of school life by making the most efficient use of all the resources available.

The St. Bart's Multi-Academy Trust is committed to improving the life chances of all children, wherever they may be. This moral obligation, our mission, does not end at the school gates, within our own Local Authorities, or even within our own country. Where St. Bart's Academies have the capacity to make a difference, they are morally bound to do so.

## Core Values

Our core values are represented through the acronym: **PEACE**

**Passion** — We are privileged to be working in education, where we have the ability to profoundly change children's lives; this means that the stakes are incredibly high. Our aim is always to provide for the pupils of our Academies what we would want for our own children.

**Encouraging** — All staff have a duty and responsibility to be encouraging and supportive of each other. All our schools have a "can do" culture where excuses are never tolerated.

**Ambition** — Embodied in the Trust motto, "Achieving schools and caring communities". All academy members are expected to aim for excellence in their individual professional roles.

**Commitment** — In the best traditions of the profession all staff are prepared to go the extra mile to provide the best possible education for their pupils. The interests of children are paramount and guide all that we seek to do and achieve.

**Enjoyment** — The time children spend in education is precious. We have a responsibility to ensure that every moment a child is in a St. Bart's Academy they enjoy learning and strive hard to achieve well and fulfil their maximum potential.

We expect that all members of The St. Bart's Multi-Academy Trust respect and model these values. These values form the basis of initial discussions with all prospective employees of the St. Bart's Academies.

# The St. Bart's Multi-Academy Trust

## Footpath to PEACE



At the heart of The St. Bart's Academy Trust is the SBMAT "Vision and Mission". Everything derives from it. The footpath of the SBMAT vision and mission lead to PEACE one step at a time:

### Step 1: Trust First

As the mission and vision are shared by all stakeholders, there is an acceptance that we are all one team, one family. All stakeholders must believe in **"Trust first"**.

### Step 2: Trust Way

As a Trust we celebrate and promote the diversity of our academies, but as one team it is right that we should also agree to do certain things in a consistent way, the SBMAT way. What is determined to be the SBMAT way will be agreed by a process of co-creation and inclusive review: however, once agreed, there is no opt-out only the **"Trust way"**.

### Step 3: Trust All

Given that SBMAT is a family, all its members – Academies, groups and individuals – must be successful. **"Trust all"** is the process by which "we all succeed together", enabling additional support to be provided where needed.

### Step 4: Trust Tomorrow

Individually and collectively, we must ensure that one eye remains firmly fixed on the future, anticipating and preparing for our next stage of development. Together we can confidently look to the horizon and **"release the potential"** in all.

# The St. Bart's Multi-Academy Trust

## A Brief History

The St. Bart's Multi-Academy Trust (SBMAT) was officially formed on the 1<sup>st</sup> November 2013, with the simultaneous opening of Cranberry Academy and St. Michael's Community Academy. Both these academies had previous close working relationships with the sponsor, Belgrave St. Bartholomew's Academy and the Britannia Teaching School Alliance (BTSA). Both were inspected for the first time in June 2015 and were graded as "Good" schools by Ofsted.

SBMAT was expanded further in March 2014, with the conversion of John Baskeyfield VC CE Primary School into the new Saint Nathaniel's Academy. More recently, the Wyche Primary School (now the Nantwich Primary Academy), Park Hall Primary School, Meir Heath Primary School, Offley Primary School, Knutton St. Mary's Primary School and St. Saviour's Primary School have also converted into the St. Bart's Multi-Academy Trust to develop capacity and expand a shared vision across the locality. These schools will be joined in 2017-18 by Kingsland Primary School, Weston Heights Infant School, Weston Coyney Junior School and Whitchurch Infant and Nursery School. This will bring the total number of academies up to 14, with a capacity model for 15- 20 schools.

As a result, SBMAT, will become the employer of some 500 staff, with over 4000 pupils, which creates huge opportunities for staff experience and expertise to be shared between schools. These opportunities are underpinned by a highly successful Teaching School Programme of professional development through BTSA. However, we remain aware that a cautious and diligent appraisal of new applicants and sponsor offers is required to minimise risk to the goals of SBMAT in the short to medium term.

## A Vision for 2-11 Education

The vision we outlined in October 2013 when we began this journey, was one that would see children from the age of three (with some possibility to explore two year old provision) educated to the end of Key Stage 2. In 2013, it was not clear how we would achieve this as all the academies had yet to convert from maintained status and the subsequent growth of SBMAT was uncertain. However, we opened our first two primary academies in November 2013 and the third in March 2014, all located in the Stoke-on-Trent and South Cheshire region and all have a close working relationship. This model has subsequently expanded to 10 academies for September 2017, with others planned for 2017-18, up to the agreed plan for 20.

This is a fulfilment of a vision built around the idea of a locally based network of schools, across four Local Authorities, taking responsibility for the quality of education in our local area. This vision was first realised through the development and work of the Britannia Teaching School Alliance (BTSA), which has been a key engine in driving the change of mind-set locally. That being a school led system of schools supporting and challenging themselves to improve outcomes for young people.

Our approach hitherto has been to grow the number of schools in the MAT through the development of a working relationship with BTSA. Growth has been effectively managed to ensure that we have sufficient capacity to support schools transferring to academy status and beyond to successful academes within the Trust. Our MAT Sponsored schools have consistently demonstrated good improvement, with two now rated as “good” and two others awaiting inspection, but “Ofsted ready”. Several good schools are now in the process of joining the MAT.

# The St. Bart's Multi-Academy Trust

## Governance Model

The St. Bart's Academy Trust Board of Directors are accountable to the Department for Education (DfE) for the success of the work of the Trust and the achievement of its charitable goals. As such they have ultimate decision making rights. The Board of Directors delegates its management of the interests of the Trust to its CEO and Central Leadership Team (CLT) on a day to day basis and they are responsible for the success of the academies. The role of the CLT is to oversee the strategic direction of the academies on behalf of the Directors of the Trust, to manage the day to day running of the academies through its scheme of delegation and to anticipate, manage and mitigate risk. The CEO acts as a bridge between the two boards.

The CLT has a scheme of delegation to its academies. Each academy has a Local Governing Board (LGB) that are accountable for standards, health and safety (safeguarding) and the effective leadership and management of the academies. The LGB delegates these responsibilities on a day to day basis to the Principal of the academy, who has operational control and responsibility for ensuring that all legal and statutory obligations are met. The CLT is responsible for the appointment of all governors to the LGB, with the exception of the two parent elected representatives. The Chair of the LGB is a direct appointment of the CEO and represents the interests of the Trust on the LGB.

The CLT understands its responsibilities to the wider community and seeks to ensure that the Trust systems and processes are robust and transparent and able to demonstrate to external scrutiny that the SBMAT is a responsible and accountable organisation of the highest quality.

## The SBMAT Board are the Directors / Trustees of the Trust.

The Trustees are:

Johnny Anderson, Chair (Business)

Colin Hopkins, Lichfield Diocese

Gill Latos (Education)

Chris Brislen CEO

Melanie Simmonds (Finance)

Robert Knight (Community)

Tony Earl (Legal)

# Trust Board Reserved Authority

## (list not exclusive):

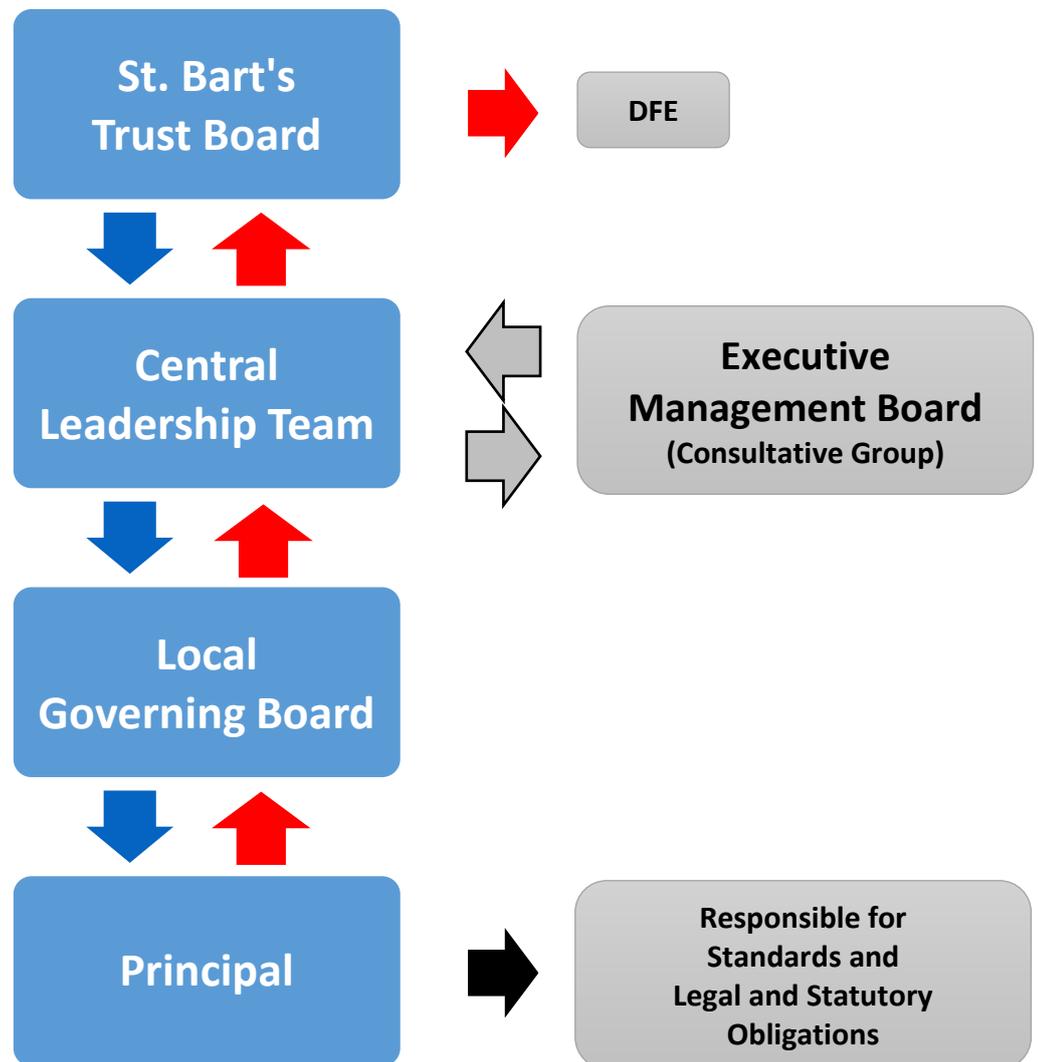
1. Challenging and supporting the CLT to improve performance and standards across the academies.
2. To bring on new schools identified and recommended by the CLT.
3. Appoint the Chief Executive Officer
4. Approval of the Annual Finance and Business Plan.
5. Approval of the Annual Report and submission of accounts.
6. Approval of Performance Data and performance indicators.
7. Appraisal of the CEO by the Chair of the Board.

Further to this:

- The Trust will approve the majority of places on the LGB of each academy and are responsible for ensuring the academies are properly governed.
- A Trustee or a member of the CLT and/or a representative of the Trust will attend each LGB.
- The LGB and Principal of each academy have a number of key responsibilities delegated to it by the Trustees.
- The Chairs of each LGB will meet termly with the CEO and members of the SLT prior to the full LGB meeting to discuss agenda items that the chairs and Board would like discussed.
- The Principals will meet formally at least half termly. Each academy is asked to produce data for the CLT around a specific focus area of performance and is then challenged to describe the improvement strategy it has in place.
- The CLT will have responsibility for finance, personnel development, estates and governance. They may from time to time delegate these responsibilities to accountable working groups for the sake of efficiency. The CLT will report to the Trustees on: the strengths of each academy; areas for improvement; Current actions and progress; finance and Buildings / Health and Safety.

# The St. Bart's Multi-Academy Trust

## Accountability Flowchart



**Key**

- Delegated
- Accountable
- Responsible

## The SBMAT Central Leadership Team are:

C. Brislen,	CEO
L. Sarikaya,	Deputy CEO Operations
I. Hunt,	Deputy CEO Standards
J. Collier,	Director of Teaching and Learning
L. Jones,	Director of Training and Early Years Development
C. Washington,	Chief Finance Officer

## The Role of the Central Leadership Team

The CLT has a strategic and operational remit, to shape the vision and deliver high quality services to SBMAT Academies. The CLT has a shared responsibility and are accountable to the Directors / Trustees and for the communication with stakeholder groups and the wider world of education.

The CLT operates in the following ways, but these are not exclusive:

- The CLT quality assures the work of the Trust.
- The CLT meets as an executive team every month and ensures that the Trust strategy and performance is regularly monitored and updated.
- CLT lead the EMB, which meets half-termly.
- CLT lead the Chair of Governors meetings once a term.
- Meet one to one with Principals at least half termly to review self-evaluation and priorities and provide support and challenge.
- Collect and analyse performance data every term to track progress against targets.
- Commission leadership training, coaching and mentoring as appropriate.
- Observe lessons and scrutinise work samples with members of the academy leadership teams to develop consistency of standards and co-ordinate the academy annual review and Principal's Performance Management Reviews.
- Plan and deliver SBMAT INSET.
- Ensure that the Trust Board has the information they need to make judgements about how best they can carry out their roles and responsibilities.
- The CLT will undertake an annual review of services provided or contracted by SBMAT.

# The SBMAT Executive Management Board

The SBMAT will have 10 academies for September 2017, with four more converting for January 2018. The Principals in each academy work closely with each other to deliver the improvements we need to see, as well as working together as system leaders across the organisation. Some of them have direct commitments to the Trust as well as to their own organisation.

The full team of Principals in the EMB are as follows:

- Lisa Sarikaya, Belgrave St. Bartholomew's Academy
- David Jobling, St Michael's Community Academy
- Helen Morris, Cranberry Academy
- Sean Thomson, Saint Nathaniel's Academy
- Georgina Frost, Park Hall Academy
- Susan Spence, Nantwich Primary Academy
- Anna Wheaver, Knutton St. Mary's C of E Academy
- Melanie Southern, Meir Heath Academy
- Jill Robertson, Offley Primary Academy
- Lynn Davies, St. Saviour's CE Academy
- Sara Goddard, Kingsland CE Academy
- Julie Birchall, Weston Federation
- Chris Martin, Weston Federation
- Sarah Cope, Whitchurch Infant Academy

## To Be Converted

# The Role of the Executive Management Board

The EMB operates in the following ways, but these are not exclusive:

- To support and implement the aims of SBMAT.
- To support and challenge the CLT to improve SBMAT services to its academies.
- Embrace the "footpath to PEACE" and ensure that all stakeholders buy into the vision and mission of the Trust;
- Commit to, connect with and collaborate across all levels of the SBMAT family, developing sense of "one team" across the Trust. The three C's.
- Ensure that the Trust Board has the information they need to make judgements about how best they can support and challenge their academies to do better.
- To develop best practice into "shared practice" across the Trust.

## The full team of Chairs of LGBs are:

G. Porter,	Belgrave St. Bartholomew's Academy
S. Molloy,	Saint Nathaniel's Academy
M. Stone,	St. Michael's Community Academy
J. Steed,	Cranberry Academy
Rev. D. Street,	Kingsland CE Academy
R. Cope,	Park Hall Academy
G. Lowe,	Nantwich Primary Academy
R. Knight,	Weston Federation
R. Knight,	Knutton St. Mary's C of E Academy
S. Brian,	Meir Heath Academy
P. Carter,	Offley Primary Academy
M. Weller,	St. Saviour's C of E Academy

## Vision and Goals – “Aiming High”

**“The greatest danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low and achieving our mark”.**

**Michelangelo di Lodovico Buonarroti Simoni**

Our academies need to respond to the challenges of a rapidly changing world. We therefore need to develop a long term strategic plan that builds upon the success of the collaboration that has been created by the SBMAT culture. We need to develop our practice so that it can be judged to be world class. Our recent inspections confirm that all our academies are making good progress, with none judged less than “Good” schools. However, only one of our academies currently meets the “outstanding grade” awarded by Ofsted and we need to raise the bar further. Our 2017 results still do not place us best in class in England. Therefore we must continue to meet this challenge head on, utilising the resource and capacity of the Trust to ensure that we have the best trained and most highly skilled workforce possible to drive up standards across the group.

# The Role of The Britannia Teaching School Alliance

The BTSA has become a highly successful Teaching School. As part of the St. Bart's Academy Trust, BTSA has an inward and outward facing programme of professional development for teachers from ITE to preparation for Headship. BTSA helps the Trust maintain a high profile both locally, regionally and nationally.

See: <http://www.btsa.org>

## Strategic Aims 2017-20

The Strategic Aims for the Trust are constantly under review, in what is a fast moving educational landscape. Under the direction of the CEO the aims will consider the expansion and consolidation needs of the Trust and the associated risks. Following the 2016-17 review the following aims remain our focus:

1. SBMAT will acknowledge the distinctive character and uniqueness of each academy, whilst seeking to operate the same guiding principles to ensure clarity of direction across the Trust. We will ensure that all stakeholders understand how they contribute to furthering the mission and vision of SBMAT. **See SBMAT Footpath to PEACE.**
2. We will develop communities that are part of a supportive and caring network of "an extended family of schools"; where the care of the vulnerable will be a priority and all fulfil their potential. We will ensure that safeguarding and equal opportunities for all is at the heart of our Trust work.
3. Every pupil will have the knowledge, understanding and skills to equip them for secondary education and the world of work beyond. In particular pupils will be able to read fluently and with understanding, be numerate and have independent learning skills, underpinned by a resilient and flexible approach to lifelong learning, through a broad and balanced curriculum.
4. We will develop high quality teaching and learning through a high quality programme of career long CPD, with the aim of becoming the best of the best.
5. We will develop great leaders at all levels, who will lead their own community and the communities in the city and play an active role in public life.
6. We will collaborate with other great schools and academy chains in the UK and abroad to develop educational practice that connects learners world-wide. Through this we will strengthen the notion of citizenship on a national and international scale, helping young people make sense of the rapidly changing world they inhabit.

# Strategic Priorities:

To achieve these ambitions over the next three years we will focus on key strategic priorities that have been developed from our core values, vision and aims. Each priority area sets out what the St Bart's Academy Trust will do to achieve these priorities and the reciprocal contribution from each academy, each of whom play an important role in securing the improvements we have prioritised for 2017-19. This Action Plan will be a "live" document, subject to regular review and evaluation.

**In order to become a high performing Academy Trust we need to:**

## 1. SBMAT FOOTPATH

**St. Bart's will:**

- Acknowledge the distinctive character and uniqueness of each partner academy;
- Develop and operate guiding principles to ensure clarity of direction across the Trust;
- Ensure that all stakeholders understand how they contribute to furthering the mission and vision of SBMAT;
- Ensure we follow the SBMAT "footpath to PEACE".

**The contribution of each academy to the delivery of this priority will be:**

- Each academy will embrace the "footpath to PEACE" and ensure that all stakeholders buy into the vision and mission of the Trust;
- Each academy will commit to, connect with and collaborate across all levels of the SBMAT family, developing sense of "one team" across the Trust. The three C's (commit, connect and collaborate).

## 2. STANDARDS

**Ensure achievement and attainment in our academies is consistently good and that pupils of all abilities across the Trust make at least expected progress from their starting points.**

**St. Bart's will:**

- Monitor and evaluate the quality of delivery and outcomes for all pupils in our academies to ensure that the promise we make to our families that all children will attend good and outstanding schools is fulfilled and to intervene rapidly when it is not;
- Engage additional, as appropriate, external scrutiny in order to provide the SBMAT Board, The CLT and Academy Principals with a reliable "second opinion" on the performance of each school across the cycle;
- Acknowledge the distance travelled already that has secured academy improvement and ensure that appropriate challenge and support is delivered to secure sustained high performance;
- Create and recruit through BTSA a Teaching School Improvement Team that provides support for our academies to deliver their targets and becomes the vehicle for sharing strategies and best practice;
- Identify and share the practice that has led to improved outcomes in one SBMAT academy with the leadership teams in other SBMAT schools so that more pupils can benefit from the original idea;
- Identify and share with our academies the strategies that schools in SBMAT, as well as those nationally and internationally are implementing, that enable

children who are at risk of underachieving to be successful, including those strategies that reduce poor attendance and persistent absenteeism;

- Design and deliver a strategy that enables our most able pupils and those who are gifted and talented to learn together, engaging in academic and sports opportunities that stretch their own expectations of what they can achieve.

**The contribution of each academy to the delivery of this priority will be:**

- To be judged good or outstanding within three years of conversion and to maintain or improve on that position subsequently;
- To teach pupils well so that all make good progress and achieve well against starting points;
- To exceed floor targets each year in the key indicators set by the Department for Education (DfE).
- To ensure that the progress of the most vulnerable pupils in the academy improves each year so that the gap between vulnerable and less vulnerable children reduces year on year to the narrowest it has ever been by 2019.
- To ensure that pupils in the academy attend regularly every year and that attendance rates are at least national average or better by 2019 taking into account contextual information.
- To ensure that the proportion of pupils whose attendance is below 90% reduces year on year, with the ambition of eradicating persistent absence by 2020.
- To engage with the SBMAT Teaching School Improvement Team and The Britannia Teaching School Alliance (BTSA) to identify areas for development and support; identify staff with the potential to become Specialist Leaders in Education (SLE) and to identify those able to make a wider contribution beyond their own academy in order that performance is strong in all academies.

### **3. WORKFORCE DEVELOPMENT**

**Recruitment, training and development of our workforce of leaders, teachers, support staff and administrators will result in the delivery of an outstanding provision for all our pupils.**

#### **St. Bart's will:**

- Monitor the quality of teaching across the Trust to support academies to provide lessons for pupils that are consistently good or outstanding;
- Build capacity to accelerate and sustain the quality of teaching across the Trust through the creation of high quality CPD programmes, where our most consistently outstanding teachers are trained to coach and support others to become consistently good;
- Support the academies to embed the SBMAT performance management policy across the Trust so that all staff are treated equally and have access to clear and well defined career pathways, with appropriate rewards for sustained and significant performance;
- Work with Principals and CLT's to ensure that the St Bart's and Teaching School Improvement Team responds to the needs of the academies to support the delivery of their professional development and school improvement priorities;
- Recruit train and deploy School Direct Trainees to ensure a pool of high quality teachers is ready for SBMAT to employ each year;
- Add value to the Newly Qualified Teacher (NQT) programme in our academies through the delivery of the BTSA NQT programme so that they will have access to a range of experiences beyond their home academy that will support them to become better teachers;
- Create and deliver high quality CPD for staff across SBMAT that they can access together which builds upon and compliments the training in staff "home" academies.
- Deliver an annual St. Bart's Conference as well as specialised Collaboration Network meetings each term so that staff recognise them as high quality sessions that promote collaboration for outstanding achievement;

#### **The contribution of each academy to the delivery of this priority will be:**

- To embed the SBMAT performance management policy into each academy so that it is understood by all staff and becomes an integral component in the improvement of the academy and the wider Trust;
- To recruit and retain high quality staff to work in each academy;
- To train and develop a high quality workforce through a range of learning opportunities;
- To support and challenge teachers so that they consistently deliver learning that is good or outstanding;
- To contribute to an receive support from BTSA;
- To commit and connect to and collaborate effectively with colleagues within and across the SBMAT to share and develop best practice;
- To identify staff who can benefit from SBMAT development programmes and activities which benefit pupils beyond the home academy;
- To contribute to the design and delivery of SBMAT network meetings and conferences;
- To host teaching placements for the BTSA ITE cohorts so that they experience a wide range of academy contexts and practices.

#### **4. Leadership and governance across SBMAT will be excellent and succession planning effective in securing leaders of the highest quality across the Trust.**

##### **St. Bart's will:**

- Build capacity across SBMAT to accelerate and sustain school improvement through the creation of an Executive Management Board which will support and challenge academies to deliver sustained improvement;
- Prioritise with academy leaders the annual focus for leadership development across the Trust that meets the needs of each academy;
- Deliver future leaders for our academies at every level of the Trust through high quality CPD opportunities;
- Facilitate secondments and exchanges that share skills, fill vacancies or develop capabilities that adds value to the learning of pupils in another academy;
- Review, revise and update the model of governance across SBMAT to ensure that the structure is fit for purpose and capable of meeting the Objects of the Trust, is consistently compliant and capable of holding the Executive Management Board and academy principals to account;
- To support LGB's to have full and appropriate membership.

##### **The contribution of each academy to the delivery of this priority will be:**

- To be clear and strategic within the Executive Management Board in order to identify priorities for improvement;
- To implement SBMAT performance management policies;
- To identify staff in the academy who are ready for further leadership development and to support and engage in SBMAT leadership training;
- To participate in the delivery of SBMAT succession planning and leadership programmes;
- To host and take advantage of secondments and exchanges to other academies;
- To work within the Executive Management Board to deepen the understanding and awareness of the improvements required in the academies across the Trust;
- To attend performance scrutiny meetings and deliver feedback and reports on the academy's progress to the highest possible standard.

## **5. The Learning Journey of all pupils from the age of 2 to 11 across the SBMAT will be excellent.**

### **St. Bart's will:**

- Support the design and delivery of a curriculum entitlement, with a clear focus on basic skills (literacy and numeracy), to provide a model of best practice that supports core subject progression across the phases;
- Monitor the transition points for all pupils to ensure that there is no loss of learning progression;
- Ensure that there is a clear focus on care, guidance and support across the Trust so that all pupils are clear about their own aspirations and understand how to fulfil them to achieve their full potential;
- Create opportunities for pupils from different SBMAT academies to learn together to reinforce pan-Trust peer learning;
- Celebrate and share the successes of children from FS1 to Y6 and beyond, so that more staff, pupils and parents witness and attest to student achievement;
- Create appropriate space where parents and families can access advice, guidance and training related to the education of students in our academies.

### **The contribution of each academy to the delivery of this priority will be:**

- To identify pupils who have made outstanding progress, made an outstanding contribution to their school and overcome significant obstacles to academic and personal success in order that their achievement can be shared across the Trust;
- Contribute to the development and sharing of best practice;
- To maintain close links with the other SBMAT Academies and local schools to ensure that children and their parents benefit from the sharing of best practice;
- To support the implementation of a high quality curriculum entitlement, focussed on basic skills for learning;
- Ensure that the needs of all children and those of vulnerable groups are met through clear guidance and support strategies that maximise opportunities and fulfil potential;
- To ensure that safeguarding is a priority and that all pupils from all backgrounds receive high quality care, guidance and support;
- To develop, publicise and support pan-Trust student and staff learning opportunities.

## 6. A Sustainable Business Plan

### St. Bart's will:

- Establish, maintain and update the SBMAT Risk Register so that potential risks to the successful delivery of this strategic plan that might have implications for our academies are mitigated;
- Ensure that SBMAT is compliant with financial rules and regulations of the charities commission and the Education Funding Agency (EFA);
- Deliver financial advice and guidance to each academy that is accurate and relevant;
- Support the academies in their development of their own risk registers that mitigates the broader risk to SBMAT;
- Support the academies to maximise student admissions to each academy;
- Support the academies to appoint the right staff of the right quality to deliver outstanding education;
- Ensure that the academy based finance and HR processes are compliant with the SBMAT policies and procedures, so that academies can manage their budgets successfully, so that key improvement objectives can be delivered;
- Continually review the structure and expertise of the SBMAT Executive Management Board and BTSA to ensure that they have adequate capacity and skill sets to support the SBMAT to deliver its goals;
- Support and develop the skills and knowledge of the SBMAT Business Management Team so that they can contribute to the sustainability of their home academy and the Trust;
- Monitor the SBMAT protocol for expansion annually to ensure that the criteria for the admission of a new academy member is fit for purpose and that the expansion does not limit the capacity of the Trust to deliver its charitable objects of improving education for our current pupils;
- Create an Estates / Health & Safety Management team that will provide expert advice for the Executive Management Board and the Directors on the state and condition of our buildings leading to a maintenance plan for 2016-20;
- Take advantage of any opportunities that exist to bid for additional grants (CIF) to support the achievement and success of our pupils or the development of our capital stock and buildings;
- Continue to develop the commercial arm of the Trust through BTSA in order to generate additional income to support learning and achievement;
- Maintain a strong local and national media presence to ensure we share the SBMAT success as widely as possible.

### The contribution of each academy to the delivery of this priority will be:

- To manage, update and review their own risks addressing key points from the Academy Register that are likely to impact on the SBMAT register;
- To develop a close working relationship through an informed and frequent communication that enables both the SBMAT Operations Board to carry out their responsibilities and the academy based teams to do the same;
- To do everything possible to ensure that the academy is oversubscribed in nursery and reception classes;
- To manage the Academy finances to deliver continuous improvement and to meet the 5% target for a surplus budget each year.

## Future Projects and Further Expansion

The Trust Board have agreed a cap of 15 academies by September 2017, with a maximum objective of 20 academies in the MAT. All further expansion must take account of the SBMAT Protocol in order to form a judgment about a potential new partner. Further due diligence using our agreed processes will provide a full picture of the potential converter for consideration by the Board of Trustees. All decisions related to the constitution of the Trust must be agreed and approved by the Board of Trustees. The Protocol is based on the following key questions:

- What will be the benefit to current SBMAT pupils and staff of a new academy joining St. Bart's?
- In view of our moral imperative to improve outcomes for pupils is there a compelling reason for us to consider the application based on need? (E.g. the school is in a category and needs urgent support).
- Is the rationale for the new joiner based on the following:
  - a) Do they share our values as an organisation? Do they buy into our "Footpath to PEACE"?
  - b) Are they a school we have an existing relationship with?
  - c) Is it close enough for our staff to travel there easily to support improvement?
  - d) Do they offer skills and expertise that would benefit the SBMAT?
  - e) Has an appropriate risk assessment and due diligence been carried out by the CEO and CLT.
  - f) Do we have sufficient capacity to help them improve in the first three years after joining?
  - g) Does the prospective new partner understand and accept the value of collaborative practice?
- Further to the above, all requests for admission to the SBMAT will be subject to due diligence.
- If the above framework / criteria are met and the CLT agree, the decision for admission will be put to the Trustees.

# ADDITIONAL NOTES

## 1. School Performance Indicators

- On entry
- GLD; KS1; KS2
- Progress over time

## 2. Staff Stability

- Number of starters and leavers in the past 3 years. If the number of starters and leavers for the past years are about the same then the school has a high turnover of staff and research may need to be done to ascertain why staff are not staying at the school.
- If the number of starters are significantly larger than the leavers this could mean one of two things; either the school is trying to address the need for educational support or they are trying to support staff that are not performing. A review of the staff and competencies would be required.
- How many staff are on temporary contracts?
- How high are the additional hours costs?
- What are the employers' pension contributions for the next three years for LGPS? N.B. on staff costs: if the structure is not working this could lead to expensive redundancies and take significant time which could impact when the 'sponsor' occurs.

## 3. Leadership and Governance

- Review the minutes of governors meetings from the last few year – assess the level of challenge and also the skill set of the governors. Are they significantly qualified enough to move the school in the right direction?
- Have governance processes and procedures been followed, e.g. with tendering? Are the governors aware of capital projects or have they been involved with tendering where this is within their delegated limits?
- What other delegated limits do they have?
- Are there any registered interests, or any unregistered interests?

## 4. Buildings and Capital

- Is the school PFI? If so, what have been the increases in PFI costs over the past three years? This could give an indication of costs to come when looking at section 5 below.
- Is the PFI schedule being kept? Who is running this? Are they effective?
- If the school is not PFI what state is the building in? Consider having your own independent inspection completed rather than the LA survey. This will highlight things the LA may not want to bring to your attention.
- Are there any funds for building improvement within the school budget? If not and it is required, what funding can be secured from the LA before conversion for these works?
- What contracts are in place for the building? Are they monitored? Are they all necessary?
- Who are the neighbours? What are the neighbours like? (May not be relevant – but good to know.)

## 5. Finance and Budget

- Study the budget for the last 3 years.

- Review all the costs and the increases year on year to see what costs are in-line and what is unexpected – a relatively easy process if the budget has been prepared the same each year.
- What financial information is given to governors – how frequently? What is the quality of the information?
- Is the sponsor going to take financial control of the sponsored schools funds? Or just monitor and guide?
- What funding has the academy received in the past, e.g. hardship funds, growth funds?
- Does the school have any leases?
- How does the school raise additional funds? Are there lettings agreements in place?

#### **6. Pupil numbers**

- Are pupil numbers stable? Are there any new projects planned for the area which could increase/decrease numbers?
- Does the school have a good reputation in the area? Is this under any potential threat – e.g. a new school being built nearby?
- What level are pupil mobility levels?
- How has the school used pupil premium funding?

#### **7. LA/ Distance from central MAT Hub**

- What is the school’s relationship with the LA? What other local services does it use/rely on?
- How far is the school from the sponsor school?

#### **8. Capacity for Improvement/sustainability**

- In which direction is the school travelling?
- What is the likely cost in time and resources to bring this school up to the “Good”?

#### **Additional Information:**

Appendix 1 DfE Due Diligence Documentation

**Christopher Brislen**

CEO

September 2017





THE ST. BART'S  
**ACADEMY**  
— TRUST —

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