



Department
for Education

Free school application form 2015

Mainstream and 16 to 19 (updated July 2015)

LIME WOOD FREE SCHOOL, Erith, Kent; made on behalf
of the Woodland Academy Trust

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(*excel documents relate)

Completing and submitting your application

Before completing your application, please ensure that you have read both the relevant 'How to Apply' guidance and the assessment criteria booklet carefully. These can be found [here](#). Please also ensure that you can provide all the information and documentation required.

The free school application is made up of nine sections

- **Section A:** Applicant details and declaration
- **Section B:** Outline of the school
- **Section C:** Education vision
- **Section D:** Education plan
- **Section E:** Evidence of need
- **Section F:** Capacity and capability
- **Section G:** Budget planning and affordability
- **Section H:** Premises
- **Section I:** Due diligence and other checks

In **Sections A and B** we are asking you to tell us about your group and provide an outline of the school. This requires the completion of the relevant sections of the Excel application form.

In **Sections C to F** we are asking for more detailed information about the school you want to establish and the supporting rationale. This requires the completion of the relevant sections of the Word application form.

In **Section G** we are asking specifically about costs, financial viability and financial resilience. This requires the completion of the relevant sections of the excel budget template and word application form.

In **Section H** we are asking for information about premises, including information about suitable site(s) you have identified. This requires the completion of the relevant section of the excel application form.

Section I is about your suitability to set up and then run a free school. There is a separate (downloadable) Word form for this.

Failure to submit all the information required may mean that we are unable to consider your application.

Sections A to H, i.e. the completed word AND excel templates in this document and the budget plans, need to be submitted by email to the Department for Education (by the application deadline)

to: mainstream.fsapplications@education.gsi.gov.uk. Your email must be no more than 9MB in size.

The Word template should be: between 50 and 100 pages long; formatted for printing on A4 paper; completed in Arial 12 point font; and include page numbers. Annexes are excluded from the page limit and should be restricted to CVs for key individuals. Please do not include photographs, images and logos in your application.

The contents of the budget excel template and excel application form are excluded from the page limit.

Please include the name of your school in the file name for all word and excel templates.

You also need to submit two hard copies (of **sections A-H** and the budget plans) by a guaranteed method such as 'Recorded Signed For' post to: Free Schools Applications Team, Department for Education, 3rd Floor, Sanctuary Buildings, Great Smith Street, London SW1P 3BT

It is essential that the hard copies are identical to the version you email.

Section I, i.e. the **Personal Information form**, is required for each member, director and principal designate that has not submitted forms within the past 365 days, together with a list of those members, directors and principals designate who have submitted Section I forms within the past 365 days? These need to be submitted as hard copies with a copy of Section A (from the Excel template) by a guaranteed method such as 'Recorded Signed For' post to: Due Diligence Team, Department for Education, 4th Floor, Sanctuary Buildings, Great Smith Street, London SW1P 3BT.

Data Protection

Personal data is collected on the Word and Excel templates in order to consider an application to set up a free school and will not be used for other purposes. For the purposes of the Data Protection Act, the Department for Education is the data controller for this personal information and for ensuring that it is processed in accordance with the terms of the Act. The department will hold all personal information you supply securely and will only make it available to those who need to see it as part of the free school application process. All personal information supplied in these forms will only be retained for as long as it is needed for this process.

Application checklist

| Name of task | Yes | No |
|---|-----|----|
| 1. Have you established a company limited by guarantee? | * | |
| 2. Have you provided information on all of the following areas: | * | |
| Section A: Applicant details | * | |
| Section B: Outline of the school | * | |
| Section C: Education vision | * | |
| Section D: Education plan | * | |
| Section E: Evidence of need | * | |
| Section F: Capacity and capability | * | |
| Section G: Budget planning and affordability | * | |
| Section H: Premises | * | |
| 3. Is the information in A4 format using Arial 12 point font, includes page numbers and is 50 to 100 pages (excluding annexes) in total? | * | |
| 4. Have you fully completed the budget plans? | * | |
| 5. Independent schools only*: have you provided all the financial information requested for in the criteria? | NA | NA |
| 6. Independent schools only*: have you provided a link to your school's most recent inspection report and completed a self-assessment form describing how your school would perform against the Ofsted Section 5 criteria and a governance self-assessment form | NA | NA |
| 7. Reapplications only. If you are reapplying after being unsuccessful in a previous round, have you changed your application in response to the written feedback you received? | NA | NA |

| | | |
|--|---|--|
| <p>8. Have you sent an email (of no more than 9 MB in size**) with all relevant information relating to Sections A to H of your application to: mainstream.fsapplications@education.gsi.gov.uk? (See guidance for dates and deadlines).</p> | * | |
| <p>9. Have you sent 2 hard copies of the application by 'Recorded Signed For' post to: Free Schools Applications Team, Department for Education, 3rd Floor, Sanctuary Buildings, Great Smith Street, London SW1P 3BT? (See guidance for dates and deadlines).</p> | * | |

**Independent schools include existing alternative provision and special school institutions that are privately run*

*** If your application is larger than 9MB please split the documents and send two emails*

| Section I of your application | | |
|--|-----------------------------|--|
| <p>10. Have you sent:</p> <ul style="list-style-type: none"> ▪ A copy of Section A (tab one of the excel template); and ▪ copies of the Section I Personal Information form for each member, director and principal designate that has not submitted one of these forms within the past 365 days; and ▪ a list of those members, directors and principals designate who have submitted Section I forms within the past 365 days <p>by a guaranteed method such as 'Recorded Signed For' post to: Due Diligence Team, Department for Education, 4th Floor, Sanctuary Buildings, Great Smith Street, London SW1P 3BT?</p> <p>(See guidance for dates and deadlines)</p> | <p>*</p> <p>*</p> <p>NA</p> | |

Declaration

****This must be signed by a company member on behalf of the company / trust****

I confirm that the information provided in this application is correct to the best of my knowledge. I further confirm that if the application is successful the company will operate a free school in accordance with:

- the requirements outlined in the 'How to Apply' guidance;
- the funding agreement with the Secretary of State;
- all relevant obligations and requirements that apply to open academies (eg. safeguarding, welfare and bullying) – this includes statutory requirements (those that are enshrined in legislation) and non-statutory requirements (those contained in DfE guidance); and
- the School Admissions Code, the School Admissions Appeal Code and the admissions law as it applies to maintained schools. 16 to 19 applicants do not need to follow these codes but must have admissions arrangements and criteria which are fair, objective and transparent.

I have fully disclosed all financial liabilities and the full extent of each/any debt for which the company, trust or existing school is liable.

I confirm that I am not and have never been barred from regulated activity within the meaning given by the Safeguarding Vulnerable Groups Act 2006. I further declare that all current members and directors of the company have confirmed to me that they are not and have never been so barred, and that if it comes to my attention whilst I am a member or director of the company that I or any other member or director are or have been so barred I will notify the Department for Education. I and all other members and directors of the company understand that the company's free school application may be rejected if a member or director of the company is found to have been barred from regulated activity.

I acknowledge that this application may be rejected should any information be deliberately withheld or misrepresented that is later found to be material in considering the application.


Position: Chair of company / Member of company (please delete as appropriate)

Print name 

Date:

NB: This declaration only needs to be signed in the two hard copy versions of your application. Please use black ink.

Please tick to confirm that you have included all the items in the checklist.

✓

Section A: Applicant details

Please complete the excel application form.

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

Section B: Outline of the school

Please complete the excel application form.

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

Section C: Education Vision

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

Section C1

The Woodland Academy Trust is currently responsible for three primary academies, each of which is increasing in size over the next 3 years through expansion. These are all located at close proximity to, but not impacting upon, the catchment of our proposed free school. Our Trust came into being in September 2011 and since that time we have chosen to expand strategically. Firstly, through the enlargement of our two converter academies but also through the opening, and year on year growth of our third school, a sponsored academy. Our schools are in the north of the London Borough of Bexley; a community that we know well and choose to serve. We also pride ourselves on the altruistic partnerships with various other organisations, including pre-school providers, who serve the local community with the same spirit of hub-working as is present in our own philosophy. Since 2011 our Trust has entered into three licences with local pre-school providers and a partnership with the NHS to provide midwifery services within this area.

We are passionate about delivering quality and holistic education to our local community, one which we know well and thus we want our children to have ever higher aspirations and we will do our very best to help them meet those aspirations.

This can be seen, for example, in the Pupil Premium of our Northumberland Heath School where in December 2014, in the Key Stage 2 category, David Laws MP wrote to the school as one of the most improved schools in the country in terms of the attainment and progress of their disadvantaged pupils since 2011.

At the end of this section we show current status tables of the schools we currently run. Lime Wood Free School will also be successful as it will be run in the same way using the embedded policies, procedures and strategies evident within our other schools.

Our schools' performances are evaluated through a variety of measures including the Government's Floor Standards as well as our own evaluation of performance through Key Performance Indicators (KPIs), Strengths, Weaknesses, Opportunities and Threats analysis (SWOT) and a RAG rated spreadsheet of comparative data. All of which are intended to act as clear indicators against which to measure our pursuit of excellence.

The core business of the Woodland Academy Trust is to ensure outstanding provision and outstanding outcomes for every child within our community. We aim to do this through:

- Developing the whole child to enable them to become exceptional learners.
- Nurturing the strengths of the local community.
- Involving the extended family in the successful development of our young people.
- All staff and Governors sharing a clear understanding that excellence is required at all times.
- Creating a stimulating and engaging environment which generates excitement in coming to school.

We work as a Trust family but each school has its own strategically targeted School Improvement Plan that meets the needs of that school's community. Additionally, each school has its own definable curriculum; built on the interests and needs of that school's pupils. It is intended that the Lime Wood Free School curriculum would be very much based upon the ecological principles upon which the entire site is due to be developed.

We are a keen supporter of Bexley's core principles of Consideration, Respect, Communication and Responsibility and as such have built these into our Trust's way of working.

A NEW SCHOOL

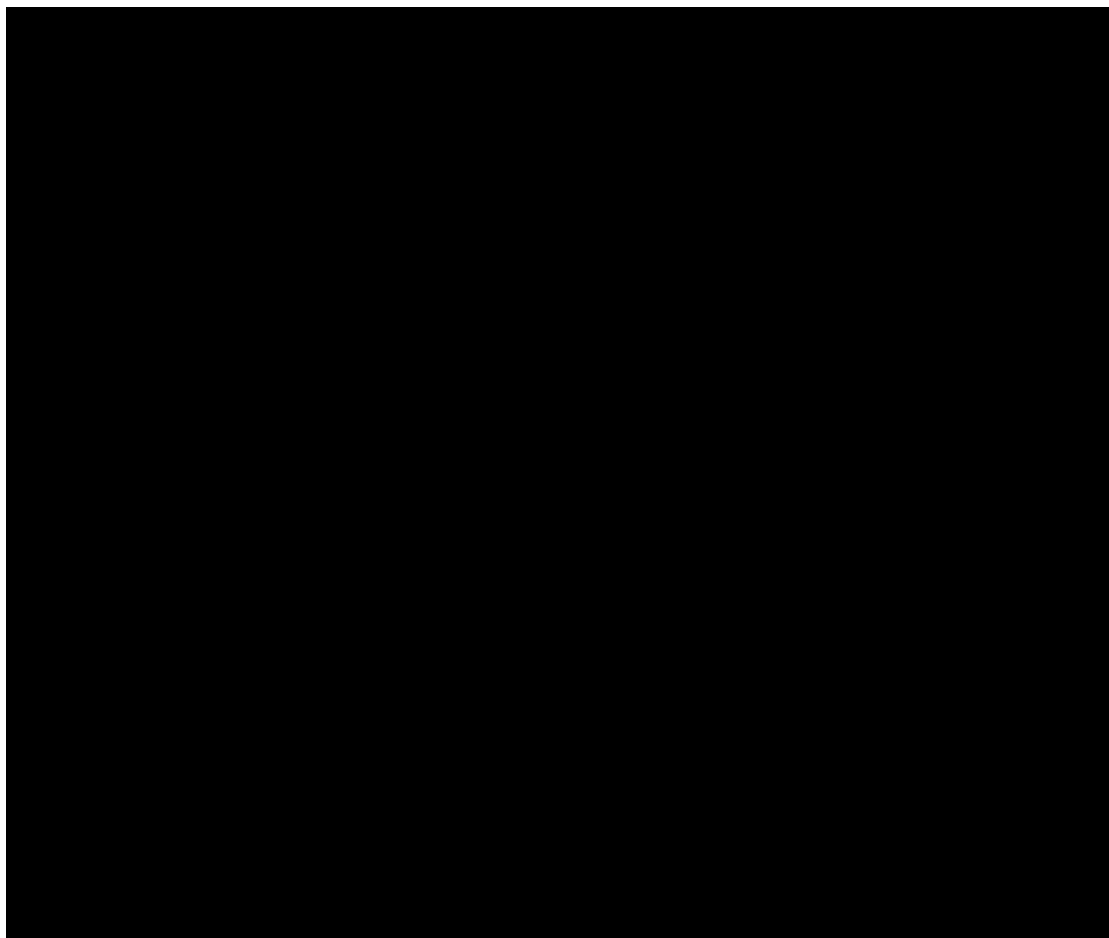
The proposed school site within the [REDACTED] area would be a natural addition to our Trust as we would name the school after the conservation area of woodland, Lime Wood, which, on the plans, is adjacent to the school building.

We know that our vision is deliverable as it is a model that is already proving to be successful and sustainable in our three, existing schools. All are above floor, all are solvent and all show year on year improvements in their data. All our schools are rated good with outstanding features.

Our Trust is seeking to establish a free school in the [REDACTED] area; a school set-up project that has been identified by the Local Council as being required through the basic need of a projected significant shortage of places within the Borough and also for the foreseeable future.

With the creation of a sizeable new housing development of 500+ homes being built on the quarry area, there will be an inevitable influx of householders from outside the area and this together will exacerbate an already identified shortage of quality primary school places. The creation of such a

sizeable new housing development will in its own right lead to demand for that community's 'own' local school. This will be a new build school, of circular design complete with play and PE areas.



Many external documents are available to support the housing needs, building design and landscape, school need, environment, transport, etc. These documents are available at:

[REDACTED]

We particularly commend the 1st pdf listed: [REDACTED] [REDACTED] which details all aspects of the school's site, location, construction, rationale in the community, and most relevantly, the underlying demographics that support the demand for a new school.

We have indicated to the LA our intention to submit a Wave 10 free school bid for the [REDACTED] site but to-date no response has been received from the Council, the Director of Education, the Deputy Director of Education or Councillors. However, approval of our bid would be an economic solution for the Council as it would save them the cost of running a competition; we are already a known and preferred provider within the local authority, as the last new school opening within the LA was that of Willow Bank, one of the three current Woodland Academy Trust schools.

Additionally, this opportunity has arisen at the right time for our Trust to look beyond expanding internally and to expand through successfully opening a fourth school. Our Trust already benefits from strong governance as well as our [REDACTED], [REDACTED], [REDACTED]. Five of our staff are either current or proposed [REDACTED].

The key features of our proposed new school will be very much through the Woodland Academy Trust trademark of inclusion, early intervention and tailored curricular to support pupils to achieve well. As the school will be new and opening from scratch, an experience that we have successfully demonstrated through the opening of Willow Bank Primary School, we would seek to deliver a wide range of early intervention and hub activities based on what we are already running in our other three schools. This early intervention agenda is very much needed as Sure Start and Children's Centres provisions are re-aligned. Our Trust has sought to protect this much needed resource through providing a dedicated hub worker who focuses on birth to five provisions across our Trust. One of the main factors of this success, which can be seen in our improved data; something that has been used as evidence for the forthcoming Parliamentary Bill, is due to our belief that our schools benefit from being in the same locality and serving the community, a community that does have very similar needs across the northern part of Bexley.

DIVERSITY & QUALITY OF PROVISION IN THE CATCHMENT

Our proposed school would reflect the aspirations we have for our other three schools. We also believe a free school, in that area, would offer diversity as the current schools in the area are church, maintained or sponsored academies. The opening of a free school will offer another avenue of choice for parents and pupils.

Quality of learning and outcome are paramount to us and we believe that we can help ameliorate the current mixed education quality in that part of the borough. We have developed a good track record and believe that we can help address the re-balancing of that situation, which is:

- Within the immediate vicinity of the new housing development there are seven primary schools, of which three are part of the Woodland Academy Trust and our schools are all over-subscribed and graded 'Good'.
- Of the 4 non-Woodland Academy Trust's schools in the immediate catchment area, one school has a current 'Inadequate' rating, two have a 'Requires Improvement' rating and one is 'Good'.
- If a slightly wider catchment area is taken, of the 9 non-Woodland schools: one is rated 'Inadequate', three as 'Requires Improvement', four 'Good' and one as 'Outstanding'.

INITIAL EXCESS ROOM CAPACITY

Knowing that the school building will have several rooms surplus in the years prior to being at full capacity, we shall utilise the space through a variety of community-required provisions which could include parenting classes, hubs, dental and health workshops etc, all of which have been proven demands within our other schools at times of surplus rooms. These and other activities will also help to galvanise the new community as an integrated entity, as more and more residents take up occupancy.

CONTINGENCY

This application for DfE Wave 10 support to open a free school coincides with the planning and then phased construction of a new community residential development by the Anderson Group. The provision of a primary school is a crucial part of that development both from an education provision context but also from a community focus perspective.

The school's physical construction, and its later operational availability needs to coincide with the timing of DfE support and funding, which in turn needs us as an Academy Trust to have our capability and capacity to be ready. We can confirm our readiness.

If there are delays in construction, and thus building availability, we will make alternative temporary arrangements as we did previously when our third school – Willow Bank – was late in its handover, where in that case we worked with the LA to provide temporary classrooms until the school was habitable.

We are confident of timings at the moment, but given the size of this major project, complete with many external pressures, we will have a project plan, a contingency plan and a risk assessment, all in place to ameliorate challenges that might present themselves.

| Existing Trust Schools' Performance – Northumberland Heath | |
|---|--|
| Ofsted judgement (date): 23.11.2010 | Current framework?: No |
| Achievement of pupils: 2 (Good) | Quality of teaching: 2 (Good) |
| Behaviour and safety: 2 (Good) | Leadership and management: 1 (Outstanding) |
| 28.03.2014 – Interim Assessment Statement – sustained performance | |

| Existing Trust Schools' Performance – Peareswood | |
|--|-------------------------------------|
| Ofsted judgement (date): 11.12.2012 | Current framework?: No |
| Achievement of pupils: 2 (Good) | Quality of teaching: 2 (Good) |
| Behaviour and safety: 2 (Good) | Leadership and management: 2 (Good) |

| Existing Trust Schools' Performance – Willow Bank | |
|---|-------------------------------------|
| Ofsted judgement (date): 31.01.2013 | Current framework?: No |
| Achievement of pupils: 2 (Good) | Quality of teaching: 2 (Good) |
| Behaviour and safety: 2 (Good) | Leadership and management: 2 (Good) |

| EYFS % Achieving GLD (6+ and 78 pre 2013) | | | | | | |
|---|------|------|------|------|------|------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| School | 71% | 78% | 70% | 66% | 73% | 83% |
| National | 56% | 59% | 64% | 52% | 60% | |

| EYFS % Achieving GLD (6+ and 78 pre 2013) | | | | | | |
|---|------|------|------|------|------|------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| School | 40% | 76% | 77% | 78% | 85% | 91% |
| National | 56% | 59% | 64% | 52% | 60% | |

| EYFS % Achieving GLD (6+ and 78 pre 2013) | | | | | | |
|---|------|------|------|------|------|------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| School | | | 63% | 57% | 70% | 76% |
| National | 56% | 59% | 64% | 52% | 61% | |

| Year 1 % Passing the Phonics Screening Check | | | | |
|--|------|------|------|------|
| | 2012 | 2013 | 2014 | 2015 |
| School | 72% | 84% | 94% | 88% |
| National | 58% | 69% | 74% | 77% |

| Year 1 % Passing the Phonics Screening Check | | | | |
|--|------|------|------|------|
| | 2012 | 2013 | 2014 | 2015 |
| School | 67% | 70% | 90% | 93% |
| National | 58% | 69% | 74% | 77% |

| Year 1 % Passing the Phonics Screening Check | | | | |
|--|------|------|------|------|
| | 2012 | 2013 | 2014 | 2015 |
| School | 58% | 68% | 91% | 95% |
| National | 58% | 69% | 74% | 77% |

| Year 2 % Passing the Phonics Screening Check Retake | | | |
|---|------|------|------|
| | 2013 | 2014 | 2015 |
| School | 78% | 80% | 67% |
| National | 69% | 66% | |

| Year 2 % Passing the Phonics Screening Check Retake | | | |
|---|------|------|------|
| | 2013 | 2014 | 2015 |
| School | 78% | 77% | 100% |
| National | 69% | 66% | |

| Year 2 % Passing the Phonics Screening Check Retake | | | |
|---|------|------|------|
| | 2013 | 2014 | 2015 |
| School | 78% | 50% | 86% |
| National | 69% | 66% | |

| Northumberland Heath Primary School | | | | | | | |
|-------------------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2c+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | 83% | 100% | 86% | 90% | 96% | 98% | 90 |
| Writing | 73% | 64% | 75% | 88% | 91% | 91% | 86 |
| Maths | 88% | 81% | 90% | 92% | 97% | 99% | 92 |

| Peareswood Primary School | | | | | | | |
|---------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2c+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | 77% | 92% | 85% | 93% | 94% | 100% | 90 |
| Writing | 63% | 81% | 74% | 93% | 80% | 90% | 86 |
| Maths | 83% | 100% | 100% | 93% | 92% | 100% | 92 |

| Willow Bank Primary School | | | | | | | |
|----------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2c+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | | | 85% | 93% | 94% | 93% | 90 |
| Writing | | | 74% | 93% | 80% | 91% | 86 |
| Maths | | | 100% | 93% | 92% | 98% | 92 |

| Northumberland Heath Primary School | | | | | | | |
|-------------------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2b+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | | | 80% | 82% | 90% | 93% | 81 |
| Writing | | | 47% | 73% | 75% | 82% | 70 |
| Maths | | | 81% | 83% | 88% | 91% | 80 |

| Peareswood Primary School | | | | | | | |
|---------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2b+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | 53% | 81% | 81% | 85% | 82% | 90% | 81 |
| Writing | 27% | 58% | 63% | 63% | 62% | 77% | 70 |
| Maths | 47% | 88% | 81% | 85% | 89% | 95% | 80 |

| Willow Bank Primary School | | | | | | | |
|----------------------------|--|------|------|------|------|------|--------------|
| Attainment | KS1 % L2b+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | | | 63% | 81% | 85% | 89% | 81 |
| Writing | | | 57% | 67% | 66% | 75% | 70 |
| Maths | | | 60% | 67% | 85% | 88% | 80 |

| Northumberland Heath Primary School | | | | | | | |
|-------------------------------------|---|------|------|------|------|------|--------------|
| Attainment | KS1 % L3+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | | | 25% | 27% | 34% | 46% | 31% |
| Writing | | | 22% | 15% | 19% | 27% | 16% |
| Maths | | | 29% | 18% | 27% | 34% | 24% |

| Peareswood Primary School | | | | | | | |
|---------------------------|---|------|------|------|------|------|--------------|
| Attainment | KS1 % L3+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | 10% | 8% | 11% | 19% | 42% | 42% | 31% |
| Writing | 0% | 0% | 7% | 4% | 12% | 18% | 16% |
| Maths | 7% | 8% | 26% | 26% | 31% | 25% | 24% |

| Willow Bank Primary School | | | | | | | |
|----------------------------|---|------|------|------|------|------|--------------|
| Attainment | KS1 % L3+ in reading, writing and maths | | | | | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2014 Nat (%) |
| Reading | | | 13% | 14% | 9% | 34% | 31% |
| Writing | | | 13% | 0% | 0% | 18% | 16% |
| Maths | | | 13% | 19% | 9% | 27% | 24% |

| Northumberland Heath Primary | | | | | | | | | |
|---|--|------|------|------|------|------|-----------------------|------|-----|
| Attainment | KS2 % L4+/5+ in Reading, Writing and Maths | | | | | | 2015 KS2 Progress (%) | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | Re | Wr | Ma |
| School L4+ | 80% | 69% | 79% | 79% | 85% | 86% | 98% | 100% | 95% |
| LA L4+ | 75% | 75% | 81% | 81% | 80% | 83% | | | |
| National L4+ | 73% | 74% | 79% | 75% | 78% | 80% | | | |
| School L5+ | 25% | 8% | 20% | 17% | 23% | 14% | | | |
| LA L5+ | | | | 26% | 27% | 28% | | | |
| National L5+ | | | | 21% | 25% | | | | |
| National Floor Standard (4+ in R,W and M) | | | 60 | 60 | 65 | 65 | | | |

| Peareswood Primary School | | | | | | | | | |
|---|--|------|------|------|------|------|-----------------------|------|-----|
| Attainment | KS2 % L4+/5+ in Reading, Writing and Maths | | | | | | 2015 KS2 Progress (%) | | |
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | Re | Wr | Ma |
| School L4+ | 59% | 50% | 75% | 68% | 70% | 86% | 95% | 100% | 91% |
| LA L4+ | 75% | 75% | 81% | 81% | 80% | 83% | | | |
| National L4+ | 73% | 74% | 79% | 75% | 78% | 80% | | | |
| School L5+ | 10% | 7% | 4% | 14% | 3% | 14% | | | |
| LA L5+ | | | | 26% | 27% | 28% | | | |
| National L5+ | | | | 21% | 25% | | | | |
| National Floor Standard (4+ in R,W and M) | | | 60 | 60 | 65 | 65 | | | |

| Northumberland Heath Primary | | | |
|------------------------------|------|------|------|
| Year 6 % L4+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 69% | 77% | 91% |
| National | 74% | 76% | 80% |
| Year 6 % L4b+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 54% | 60% | 88% |
| National | | 58% | 73% |
| Year 6 % L5+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 31% | 46% | 58% |
| National | 48% | 52% | 56% |

| Peareswood Primary School | | | |
|---------------------------|------|------|------|
| Year 6 % L4b+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 63% | 63% | 86% |
| National | 74% | 76% | 80% |
| Year 6 % L4+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 46% | 60% | 82% |
| National | | 58% | 73% |
| Year 6 % 5+ EGPS | | | |
| | 2013 | 2014 | 2015 |
| School | 29% | 40% | 71% |
| National | 48% | 52% | 56% |

Section D: Education plan – part 1

In the table below, please provide the proposed numbers in each year group at the point of opening and an explanation of how pupil numbers will build up over time. Please add additional rows/columns if appropriate. If you are an existing independent school wishing to become a free school, please use the first column to show how many pupils you currently have. If you are proposing more than one school you will need to complete a separate table for each.

If you are proposing to open later than 2017, please leave the relevant earlier columns blank.

This section will need to be completed by both route 1 and 2 applicants.

| | Current number of pupils (if applicable) | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|------------------|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Reception | | 90 | 90 | 90 | 90 | 90 | 90 | 90 |
| Year 1 | | | 90 | 90 | 90 | 90 | 90 | 90 |
| Year 2 | | | | 90 | 90 | 90 | 90 | 90 |
| Year 3 | | | | | 90 | 90 | 90 | 90 |
| Year 4 | | | | | | 90 | 90 | 90 |
| Year 5 | | | | | | | 90 | 90 |
| Year 6 | | | | | | | | 90 |
| Year 7 | | | | | | | | |
| Year 8 | | | | | | | | |
| Year 9 | | | | | | | | |
| Year 10 | | | | | | | | |
| Year 11 | | | | | | | | |
| Year 12 | | | | | | | | |
| Year 13 | | | | | | | | |
| Totals | | 90 | 180 | 270 | 360 | 450 | 540 | 630 |

Section D: Education plan – part 2

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

In the table below, please provide details about each subject and any enrichment/out-of-hours activities in the planned curriculum. This table contributes towards D1. Please add additional lines as required.

This section must be completed by route 2 applicants.

| Subject/other activity (e.g. enrichment) | Hours per week | Mandatory/ Voluntary | Comments |
|--|----------------|----------------------|---|
| English | 5 | Mandatory | Delivered daily. |
| Guided Reading | 2.5 | Mandatory | Delivered daily. |
| Maths | 5 | Mandatory | Delivered daily. |
| Discrete EGPS | 2.5 | Mandatory | Delivered daily. |
| Science | KS1 1 KS2 2 | Mandatory | Delivered per week but could be blocked together for major science projects. |
| Computing | 1 | Mandatory | Can be delivered as a discrete or as part of another subject's provision e.g. maths spreadsheets using excel. |
| Art | 1 | Mandatory | To be a major, contributing subject to the SMSC and PSHE provision. |
| Music | 1 | Mandatory | To be a major, contributing subject to the SMSC and PSHE provision. |
| RE | 1 | Mandatory | To be a major, contributing subject to the SMSC and PSHE provision. |
| History | 1 | Mandatory | To be a major, contributing subject to the SMSC and PSHE provision. |
| Geography | 1 | Mandatory | To be a major, contributing subject to the SMSC and PSHE provision. |

| | | | |
|---------------------------------------|------|-----------|--|
| PE | 2 | Mandatory | To include a focus on nutrition, healthy lifestyles and exercise. KS2 provision will include free swimming lessons for all. |
| Collective Acts of Worship | 1.25 | Mandatory | There will be a daily collective act of worship which will be split between whole school and class gatherings. A variety of materials will be used as a basis for delivery of this provision. One major resource will be the Social and Emotional Aspects of Learning materials (SEAL). |
| PSHE | 0.50 | Mandatory | Personal, social, health and economic education will be delivered discretely each week but will also take place intrinsically through various assemblies and curriculum subjects as well as other special times during the school week e.g. circle time. |
| SMSC | | Mandatory | No specific timing has been given for this aspect of the curriculum as this is the “golden thread” that will run across the school day and throughout the school week in a variety of lessons, assemblies and activities. This aspect will have an overall plan and various topics will be covered through the thematic delivery of curriculum subjects. |
| Extra-curricular clubs and activities | 10 | Voluntary | There will be a breakfast club running for 1.25 hours before school each morning. This will provide a range of social and play activities as well as a breakfast meal. After school a range of extra-curricular clubs will run through a mixed diet of in-house and externally provided staff. |

Section D1:

TIMETABLED WEEK

We propose the following generic timetable with an intention that core study will take place between 9.00am and 3.15pm. The outline below does not show our before school, lunchtime or after school provision. We intend to offer an enrichment programme and other associated activities/provision in an overall core for the school to be:

| | |
|--|---------------------------|
| EYFS and Key Stage 1 (Reception, Years 1 and 2) | 9.00 - 10.15 am Morning |
| | (10.15 am break) |
| | 10.30 – 11.30 pm Morning |
| | (11.30–12.30 pm Lunch) |
| | 12.30 – 1.45 pm Afternoon |
| | (1.45 pm break) |
| Key Stage 2 (Years 3-6) | 2.00 – 3.15 pm Afternoon |
| | 9.00 - 10.30 am Morning |
| | (10.30 am break) |
| | 10.45 – 12.30 pm Morning |
| | (12.3–1.30 pm Lunch) |
| | 1.30 – 3.15 pm Afternoon |

The curriculum within Lime Wood Free School will be designed to promote children's independence as learners and to provide them with the motivation and the skills to succeed, whatever their circumstances. Given the wonderful setting, and ecological environment, a major part of our curriculum will be based on an outdoor and adventure theme. The proposed site sits within an area dominated by housing, road links and industry, and is essentially an oasis within the community. Our expert knowledge of the local context shows that the free school will be likely to have a percentage of children eligible for FSM at around the 50% or higher level, putting it in the highest quintile nationally. In addition, we know that it is likely to face many of the educational challenges associated with schools that have high levels of FSM, low levels of adult-literacy and a low proportion of adults in further education. At Lime Wood Free School therefore, we will inspire all children through the use of the outdoors and strive for everyone to achieve qualifications in a wide range of adventure pursuits, opportunities they would be unlikely to have access to otherwise. This element of the curriculum will be closely linked to, and delivered through, all other areas of the curriculum and through the subjects outlined in the National Curriculum for England.

Our children, staff, parents and governing body will work together to draft their Lime Wood core values, which will underpin everything that we do as a school community. Through our corporately owned values we aim to deliver the school's vision of every child achieving in line, or better than, their personal potential. Low expectations are not acceptable in any of our Trust's schools and the same will be in place for Lime Wood Free School.

Within our Trust the SENCo role is known as an 'Inclusion Leader' as it encompasses all pupil groups as well as those pupils with special educational needs. Certainly in the initial stages of opening, this role will play a crucial part in identifying the needs of hitherto unknown families, and therefore in curriculum design. For the first two years of Lime Wood's existence, the Inclusion Leader will also be the Head Teacher. The Head Teacher Designate is currently an SLE for inclusion and is our Trust's lead Inclusion Leader. The experience and expertise that she will bring to Lime Wood will not only more than fulfil the Inclusion Leader role within the new school but she

will also be in the position within Year 2 to recruit a new Inclusion Leader to commence within the school in year three of the school's life and to be in a position of expertise from which to induct and mentor the Inclusion Leader when they commence in September 2019.

HOW THE CURRICULUM WILL BE STRUCTURED

In the Early Years Foundation Stage (EYFS), the curriculum will be based on the Statutory Framework for the Early Years Foundation Stage, and the non-statutory guidance 'Early Years Outcomes'. A key theme in Lime Wood's EYFS provision will be access to a forest school for all children. The forest school will enable to make early gains in their personal, social and emotional development, communication and language skills and in their understanding of the world. These are all areas that we know, from our local knowledge and experience, will be likely to be low on entry for the reception children. The forest school will also be pivotal in physical development opportunities in a community that, in our experience, has many children with no access to gardens. We will use established Trust systems for ascertaining children's levels of need before entry to Lime Wood's EYFS (and indeed, in further years for all casual admissions). This will include home visits, visits to children's pre-school settings, liaison with parents and all other professionals working with the child. Through these mechanisms we will establish the level of need and therefore the curriculum requirements of all children including vulnerable groups such as looked after children, children with disabilities or other special educational need, children from families seeking asylum and refugees and children with exceptional gifts and talents in specific curriculum areas.

The curriculum for Key Stages One and Two will follow the National Curriculum for England and will also incorporate RE, PSHE and Outdoor and Adventure Learning. Across all three key stages, spiritual, moral, social and cultural aspects of education will also be seamlessly interwoven.

To engender a love of learning within our children, we will build on their natural curiosity and inquisitiveness by basing it around an enquiry approach. This will enable them to develop mastery across the breadth of curriculum subjects and to work at a greater depth within the age-related standards. The school's proposed curriculum is based around a series of 'Big Questions', which will be thematic in order to give a context to the children's learning. Computing, Maths (including financial awareness) and English (including performing arts and oracy) will underpin the whole curriculum and will be incorporated across the full breadth of subjects.

Each 'Big Question' will be based on history, geography or science. These subjects will be the drivers for the proposed curriculum. Although they will be based on the national curriculum requirements for these subjects, the Big Questions will be sufficiently responsive to local, national and global events in order to develop children's community cohesion and their place in the global society. Teachers will ensure that the Big Question also takes into account the children's interest, enabling them to engage even further with their curriculum by having an element of ownership over it. Each Big Question will be sub-divided into a series of smaller questions in order to give structure to each learning theme. The curriculum at Lime Wood Free School will be reviewed at least annually in order that it continues to reflect the ever-changing needs of its children. Some of the Big Questions will form a whole school focus to develop the school as a learning community. The school will also incorporate important worldwide or national events into the curriculum such as Referendums and the General Elections. These will form the basis for assemblies, lessons and whole school events such as voting for the School Council and other pupil voice groups. The length of time taken on each 'Big Question' will be dependent on the progress the children make. By the end of the academic year all children will have had the opportunity to learn all the relevant objectives in the National Curriculum.

In addition to the driver subjects, each Big Question will be complemented by the subjects of art, design technology and music in order to ensure that these subjects are recognised as essential to the holistic development of each individual child.

PE, RE, PSHE and MFL will all be taught within the Big Questions, where there are appropriate links to be made. If no natural links exist then they will be taught discretely.

The outdoor and adventure element of the curriculum will be taught predominantly through PE and Science, but will not be limited to these subject areas. This important element of Lime Wood's curriculum will be planned to meet the children's needs but is likely to include at least the following elements.

A school eco-garden for developing knowledge about the natural world and the children's role in creating a sustainable future.

Food education delivered through the science curriculum. This is likely to make use of another Trust school's resources such as bee hives and chickens.

Opportunities to develop skills in pursuits that they would not usually have access to and gain qualifications in those sports; Lime Wood Free School would make use of another Trust school's climbing wall to enable children to gain their NICAS level 1 and 2 awards in addition to Local Authority watersports facilities to gain their Paddle Power qualifications from the BCU.

The Royal Society of Birds (RSPB) Wildlife Awards will be delivered through the science and PSHE curriculum. The Erith Quarry site is within an ecologically protected area and would lend itself to ecology and outdoor learning being a basis through which to deliver the National Curriculum. There will also be the opportunity to use the Erith and Crayford marshes, an ecologically important wetland area that is home to a wide variety of flora and fauna.

The John Muir Award, which is based on the elements of discovery, exploration, conservation and sharing. We will aim for all children to achieve at least one level of The John Muir Award by the time they leave us at the end of KS2. The John Muir Award will also help our children to develop the core school values.

All of the above examples are real examples that are happening in our three schools as part of their curriculum offer. The Woodland Academy Trust values learning outside of the school environment because it supports its vision of developing learners for life. Teachers within the Trust are encouraged to maximise the opportunities available to take the children outside of the school to learn, and trips are carefully planned. Additionally, the school will encourage the children to attend residential opportunities in order to develop both their academic and social development. Each year group will have a number of experiences that they will be expected to provide within that academic year. These can include visiting a beach or zoo and are valued as opportunities to develop the 'whole' pupil.

SPIRITUAL, MORAL, SOCIAL AND CULTURAL (SMSC) UNDERSTANDING AND FUNDAMENTAL BRITISH VALUES

The school will aim to develop the children's SMSC through direct teaching in the curriculum and also through the wider opportunities such as assemblies and the ethos and values that the school promotes. This includes the development of the children's understanding of other cultures and what it means to be British. This will be especially important given that Lime Wood Free School is

likely to have a culturally diverse intake of children. We know this due to our expert knowledge of the local area, Erith and Belvedere especially.

The school, along with the other schools in our Trust, will actively promote British Values which we believe will prepare pupils for life in modern Britain. To achieve this we shall use our curriculum, and the “The Big Questions” to enable the pupils to relate experience to learnt knowledge. In particular these values will be woven into assemblies and into further aspects of personal, social, moral and cultural development. The school will promote democracy, the rule of law, individual liberty, mutual respect and tolerance of different faiths and beliefs.

Lime Wood’s positive and inclusive atmosphere will ensure that pupils experience these values on a daily basis. Additionally, the Prevent Duty will be implemented through a clear staff training programme that will enable staff to deal with any issues of extremism and radicalisation that may occur during any lessons within school or from community attitudes outside of Lime Wood Free School.

To further develop fundamental British values and SMSC, Lime Wood Free School will have an active body of pupil voice representatives. The representatives will also influence elements of the curriculum where appropriate. For example, they may decide to support a charity and ask for a curriculum day in respect of this. There will be a School Council, Restaurant Committee, Junior Travel Ambassadors, Sports Leaders, Outdoor Learning Champions and an E-Safety Council at the very least.

RE, PSHEE AND COLLECTIVE ACTS OF WORSHIP

All pupils will follow a structured and age related Personal, Social, Health and Economic Education (PSHEE) programme covering such things as hygiene, safety, fiscal awareness and personal development. Personal safety is also addressed through a range of activities including the Life Bus and Road, Rail and Water Safety. This ensures children revisit these topics regularly. These will be particularly important given the intended focus of the curriculum as outdoor and adventure led.

Children will have the opportunity to participate in a weekly PSHEE session with their class teacher during which time such issues as relationships and feelings will be explored in a safe environment. When pupils reach Year 5 they will participate in a series of sessions covering puberty as well as physical, emotional and social change. During Year 6, lessons will encompass sex education and human reproduction. Parents of these children will be invited to discuss these lessons before they occur and will be given the opportunity to withdraw their child if they wish.

Lime Wood Free School will have no religious affiliation. However, the school will follow the Bexley Agreed Syllabus as laid down in the 1988 Education Act. Collective Acts of Worship will be ‘of a broadly Christian character without being distinctive of a particular religious denomination’. Through classroom teaching and school assemblies, there will be a presentation of basic Christian ethics linking with children’s everyday life. Knowledge of the Bible will be included in these lessons, as well as a celebration of major Christian festivals. Children will also learn about other faiths and will be encouraged to develop an awareness of, and respect for, different cultures to their own.

PARENTAL INVOLVEMENT

The Woodland Academy Trust already stresses the importance of parents’ involvement and support in their children’s learning. This has been a success in our other schools and we envisage that this successful approach will continue within Lime Wood Free School. We believe each

child's success is enhanced when they are able to build on their classroom learning at home. There are many ways in which parents will be encouraged to support their children including:

- Ensuring punctual and regular attendance.
- Support and encouragement for completion of homework, particularly listening to their child read at home and through reading stories to their children.
- Encouraging their child to talk to them about their day and to listen to the children when they are talking.
- Visiting different places together to broaden their experiences e.g., coast, library, nature parks, woodland walks etc.
- Being aware that social networking sites, such as Facebook, are only deemed to be appropriate for children aged 13 years and upwards.

Lime Wood Free School parents will be able to readily access the curriculum for each year group via the school's website which will be part of our Trust website with easily accessible tabs for each school. This will mean that parents will be fully aware of what their child will be covering within the academic year and can support their child's learning at home. Our Trust has developed a series of Learning Journeys, which will also be available through the school's website, to ensure that parents can become familiar with the learning journey of their child and to support them with their next steps and the school's assessments procedures.

In line with the practice within our other schools, parents will also be invited to become involved in the life of the school through a wide range of avenues. This will include parents attending workshops, adult learning courses, stay and learn sessions in the Early Years Foundation Stage and through half termly adult welcome events, accompanying school trips or using their practical skills around the school and grounds, including the nature areas. The school will also encourage parents to become involved in the work of the Trust through becoming Parent Governors.

Section D2:

A major part of the Trust's vision is to provide outstanding outcomes for all children in our care. As such, the minimum target for pupil performance, attendance and behaviour at Lime Wood Free School would be to at least match the national figures in all key stages. Based on the outcomes of the other Trust schools, it is realistic to expect that the performance targets for Lime Wood Free School will be set above the national figures for pupil performance.

The school will use a range of measures to review and improve pupil performance, including the use of target setting. Targets for pupil performance, behaviour and attendance will be set by the Head Teacher, in partnership with the Executive Head Teacher, operating on behalf of the Trust. RAISEonline data will form the starting point; in the initial years this will be to make use of national data in the target setting process. As the school begins to generate reportable data of its own, RAISEonline full reports, interactive reports and inspection dashboards will be used by school leaders for the purpose of target setting. The Trust also has three other schools in the locality of Lime Wood Free School, and the data from these schools will be used for benchmarking purposes. All of the Trust's schools' data is above the national indicators for all measurable attainment outcomes and it is therefore reasonable to expect that this is where the targets will be set for Lime Wood Free School. The baseline assessments of all new entrants to the free school will also be considered in the target setting process.

In order to ensure regular appraisal of the suitability of the targets, performance data will be reviewed formally at six points of the academic year in Pupil Progress Reviews. The reviews will be held, one for each class, and will be led by the Phase Leader for that class. The reviews will be

attended by the Head Teacher, Inclusion Leader and class teacher, in addition to the Phase Leader. Each child will be red, amber or green (RAG) rated against the performance targets that they have been set. In the Pupil Progress Reviews, children with red or amber ratings in any of the targeted measures will be discussed, with appropriate intervention decided. In the event of all children having a green rating, in all performance measures, those with the lowest progress will form the basis for discussion around further intervention. The resultant decisions will form an action plan that will be reviewed at the next Pupil Progress Review Meeting. The Phase Leaders will make fortnightly checks, to ensure each action plan is having the required impact. This mechanism allows the action plan to be amended without waiting for the next Pupil Progress Meeting, if necessary. Performance data will also be included as part of the Performance Management process for all staff.

The Head Teacher will be responsible for reporting a summary of performance to the School's Governing Body every term. The Governors will hold the school to account through the use of the RAISEonline full report governance pages, alongside a summary of in-school data provided in the Head Teacher's termly report. They will hold the Head Teacher to account against the performance targets that have been agreed with the Trust.

In order to measure the academic performance of all children, the Trust has implemented its own assessment system. Our assessment system is based entirely on age-related statements, as prescribed by the Statutory Framework for the Early Years Foundation Stage, the non-statutory guidance 'Early Years Outcomes' and the National Curriculum for England. This will give our schools, including Lime Wood, a continuous framework from which to measure pupil attainment and progress that stretches from birth to age 18 in theory, although the school will only admit children up to the end of Key Stage 2. This continuous framework is called 'The Learning Journey'. The Learning Journey has been published for all compulsory national curriculum subjects, with the inclusion of RE and PSHEE, in child-friendly language.

The Learning Journey Framework allows our schools to report a single, meaningful piece of data related to each individual child's age, for each subject of the curriculum. These are called 'Steps'. For example, a child at the beginning of Year 2 will be 6 years old. It is expected that they will be working at Step 6 of the assessment system. At the end of Year 2, the child will be 7 years old. It is expected that they will be working at Step 7 of the assessment system. The system is designed to achieve maximum continuity, with the same amount of progress expected in each year group from Nursery through to Year 6; that progress being one whole 'step'. It has been adopted by two of our three pre-school providers working in partnership with the Trust, thus potentially giving the schools the ability to track pupil performance from age 2 upwards.

The Learning Journey for each subject is arranged into sections, starting from Step 1 and continuing, for example, to Step 2, Step 3, and Step 4 etc. Each section contains all the objectives covering the skills and knowledge required for that age. Each section also contains key performance indicators (KPIs). The KPIs describe the most essential skills and knowledge that a child **must** be able to demonstrate in order to be considered working at the age related expectation. The inclusion of KPIs means that we can establish a baseline assessment of all casual admissions in a timely manner. This will be essential in a new school that, due to the catchment area, is likely to experience a relatively low stability rate in relation to the national figure.

Our system is designed so that it is easy for all stakeholders, including parents, to understand. For example, parents can easily identify whether their child is working at the correct step for their age. For example, if a child at the end of Year 4 is working below Step 9, the parents will be able to

hold the school to account. The Learning Journey document will empower the parent with the specific knowledge of their child's areas for development.

More importantly, it is designed so that all stakeholders, such as Governors, can hold the school to account for pupils' attainment, progress and overall performance in all subject areas of the curriculum.

Our system also makes it easy for children to understand their own level of performance, related to their age, from Nursery through to Year 6. Children can refer to The Learning Journey document in order to take control of their own learning, setting themselves challenging targets and experiencing the satisfaction of meeting those targets. Through this model we aim to build life-long learners.

Currently our teachers use The Learning Journey Framework as a gap analysis tool. This empowers them to plan work that challenges all children and personalises each child's learning. As each child progresses, and demonstrates that they have met the objectives set for them by applying their learning independently, the teacher can amend the gap analysis and plan for the next priority area of need.

In order for the school to track pupil progress effectively, each step of The Learning Journey Framework is divided into six further sub-divisions. Six sub-divisions have been chosen to match the number of school terms in a year. For example, progression through Steps 5 and 6 would appear thus: 5c, 5c+, 5b, 5b+, 5a, 5a+, 6c, 6c+, 6b, 6b+, 6a, 6a+. This pattern continues throughout all of the steps. For example, in terms of this refined assessment measure, a child starting Year 1 would be expected to be a 6b in any given subject. By the end of the year, after six half terms, it is expected that they will have progressed through at least 6 sub-divisions, attaining at least Step 7b in that subject. In this example, the child may go on to exceed the progress that is expected of them. The system allows for this because it has been designed to recognise that a child is still working within the age related expectation, but is developing mastery of the curriculum area. In the case of a Year 2 child at the end of the year, this would be reflected in an assessment grade of 7b+, 7a or 7a+; still working within the age related curriculum, but developing their mastery of it. The system of sub-divisions will allow school leaders, of all subjects and at all levels, to hold each other to account for the performance of the children.

The data tracking system is kept electronically. Through use of a secure password system, with differing levels of access for different stakeholders, all users are able to access real-time information about the progress and attainment of individual pupils, or groups of pupils. This will eventually include parents and children being able to have online access the relevant assessment information. Teachers, support staff, school leaders and Governors will also be able to access reports that are specifically designed for their roles. For any parent unable to access this information through personal devices, due to having no access to the internet, the school will provide facilities that enable them to do so, ensuring that any disadvantage is minimised.

In addition to online access, performance data will be reported to parents formally on three occasions in the school year. In the final term this will be in the form of a written report by the class teacher. Parents will be welcome to request further meetings throughout the year, whenever they feel it is necessary to do so. Performance data will also be reported for specific children with identified additional needs through other, appropriate forums. This may include Looked After Children Reviews, Behaviour Planning Meetings, ASD Planning Meetings, Speech and Language Planning Meetings (or planning meetings for other additional needs, such as hearing, or visual impairment), Common Assessment Framework Meetings, Team Around the Child/Family Meetings and Pastoral or SEN Support Plan Meetings. In addition, translators will be used to

report the performance of children from families who do not confidently speak English as a first language. The school will also report information of a safeguarding nature to all relevant agencies, in line with guidance contained in 'Working Together to Safeguard Children', 'Keeping Children Safe in Education' and 'The London Child Protection Procedures' (or the relevant guidance at the time of opening the school).

Regular surveys will also be used to communicate with parents in order to improve provision even further.

Throughout their entire school life, and particularly in the Early Years Foundation Stage, parents will be encouraged to contribute to the assessment profile of their children through the use of The Learning Journey Framework. Through learning diaries, homework and home-school liaison, parents will be able to enable the whole-child to be assessed, and therefore to feed into the development targets for their child.

The school will implement the Trust's preferred behaviour system, called 'Good to be Green'. The system is designed as a powerful visual reminder to children regarding the high expectation for their behaviour. It is designed around a 4-stage system; behaviour is good, behaviour is consistently good, a warning for behaviour which is not meeting the standards and a consequence for not adjusting behaviour to be at least good. The system is designed to encourage the children to become intrinsically motivated to behave well, and does not rely on extrinsic rewards. The behaviour system will also be extended for parents to use at home, where appropriate and necessary, in the same way that it has in the other Trust schools. This gives a support mechanism for families who need extra support with behaviour and gives for consistency between the home and school.

As the behaviour system allows the teacher to record each child's individual behaviour profile, performance for individual children can be monitored and reported on in the same way as academic performance. Behaviour will be reported to parents in the same way that other data is reported. The Head Teacher will also be held to account by the Governors for the behaviour of children in the school using this system.

Pupil attendance will be monitored by the Head Teacher on a fortnightly basis. Lime Wood Free School will use the established systems used by the other schools in the Trust, which have led to improved attendance.

Pupils will be rewarded for good attendance; they will earn certificates for 100% attendance in a term and a medal for 100% attendance across the year. There will be weekly rewards for the class with the highest attendance and punctuality that week.

The parents of any child falling below 96% attendance will automatically receive a letter from the Head Teacher to inform them that this is below the school's expectation. It will offer the necessary support to ensure the child's attendance improves. If there is no improvement in the child's attendance, the parent will be invited to a meeting with the Head Teacher to explore the causes of the poor attendance. There will be regular review meetings while the attendance starts to improve. If a child's attendance falls below 90%, the school will call a meeting with the Head Teacher, the parent, a Governor and the Trust's attendance advisory service. In this meeting, an action plan will be drawn up that includes actions for all members present. In the absence of the parent attending, the action plan will still be drawn up and implemented.

The school will use school funds, or the pupil premium grant, to fund any initiatives aimed at improving the attendance of individual children. In the event of attendance continuing to deteriorate, the school will seek to prosecute parents and involve relevant external agencies, such as children's social care. In order to ensure that all outcomes for children are the best that they can be, the school will focus heavily on measuring and improving the quality of teaching in the classroom.

The Trust's comprehensive systems for evaluating classroom performance will be adopted by Lime Wood Free School and include lesson observations, work and planning evaluations, mentored lesson observations, moderations of work samples and child interviews and surveys. In addition, the school will benefit from the Trust systems of peer review and externally validated school improvement and review methods undertaken by INCYTE International Ltd.

All teachers will be entitled to a professional audit, forming a complete 360 review of their performance. The results of this audit will be used to formulate a tailored package of continuing professional development (CPD) for each teacher. In addition to this bespoke training plan, teachers will have a core CPD offer that is provided by the Trust. To ensure that teachers' CPD has the maximum impact on pupil progress and attainment, the development points arising from the half-termly pupil progress reviews will also be used to highlight any specific areas of training for individual teachers.

Lime Wood Free School will benefit from the Trust's school improvement models and systems when measuring and focusing on the quality of teaching and learning. These will include a comprehensive overview of the school improvement year, access to NLE/SLE support in key areas of the school's work, access to the Trust system of leading teachers (as well as the opportunity to contribute to this system), peer to peer moderation, monitoring and support, facilitated peer group coaching and an IOE gold-accredited CPD menu. To further support teachers in improving their individual practice, Lime Wood Free School will be able to draw on support from the Trust's strategic partnerships with New Horizons Teaching School Alliance, Leigh Academies Trust and INCYTE International Ltd.

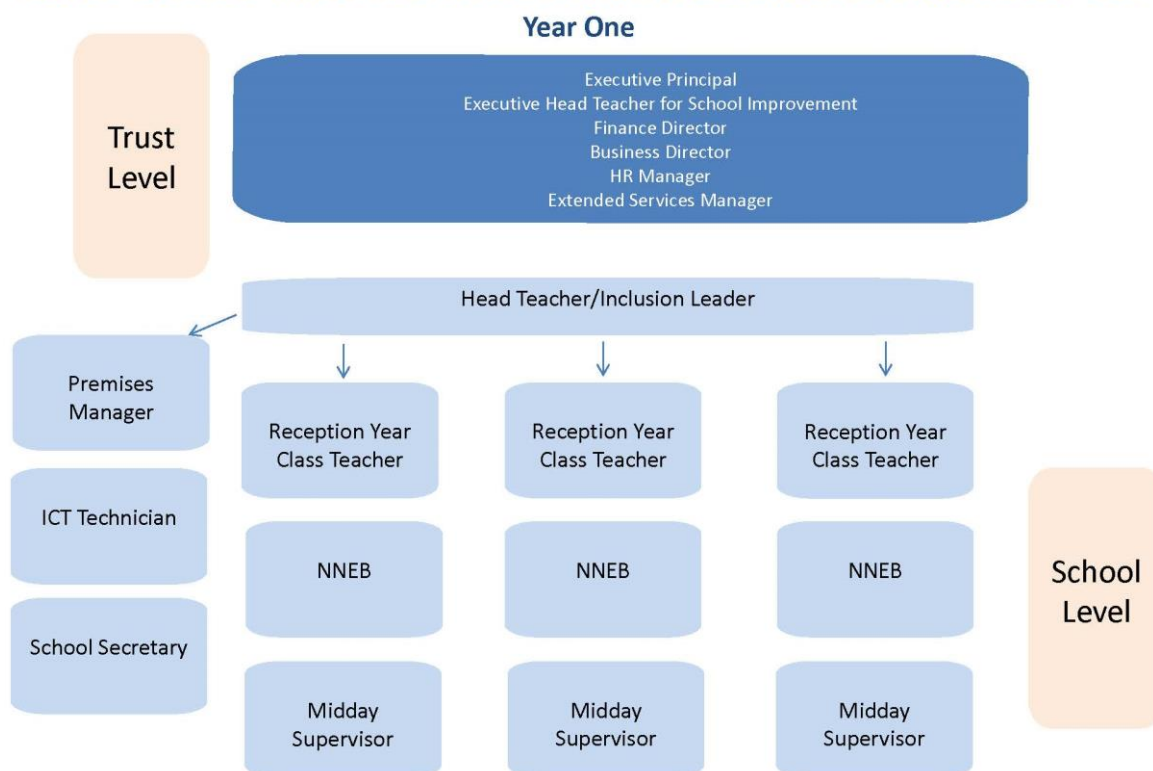
LIME WOOD FREE SCHOOL - SCHOOL TRAVEL PLAN

It is likely that a sizeable majority of the children to the new school will live on the new housing development, and a lesser minority within 2km of it. Our Travel Plan for the proposed school is already well developed, although clearly not yet complete. This (currently 27 pages) report covers:

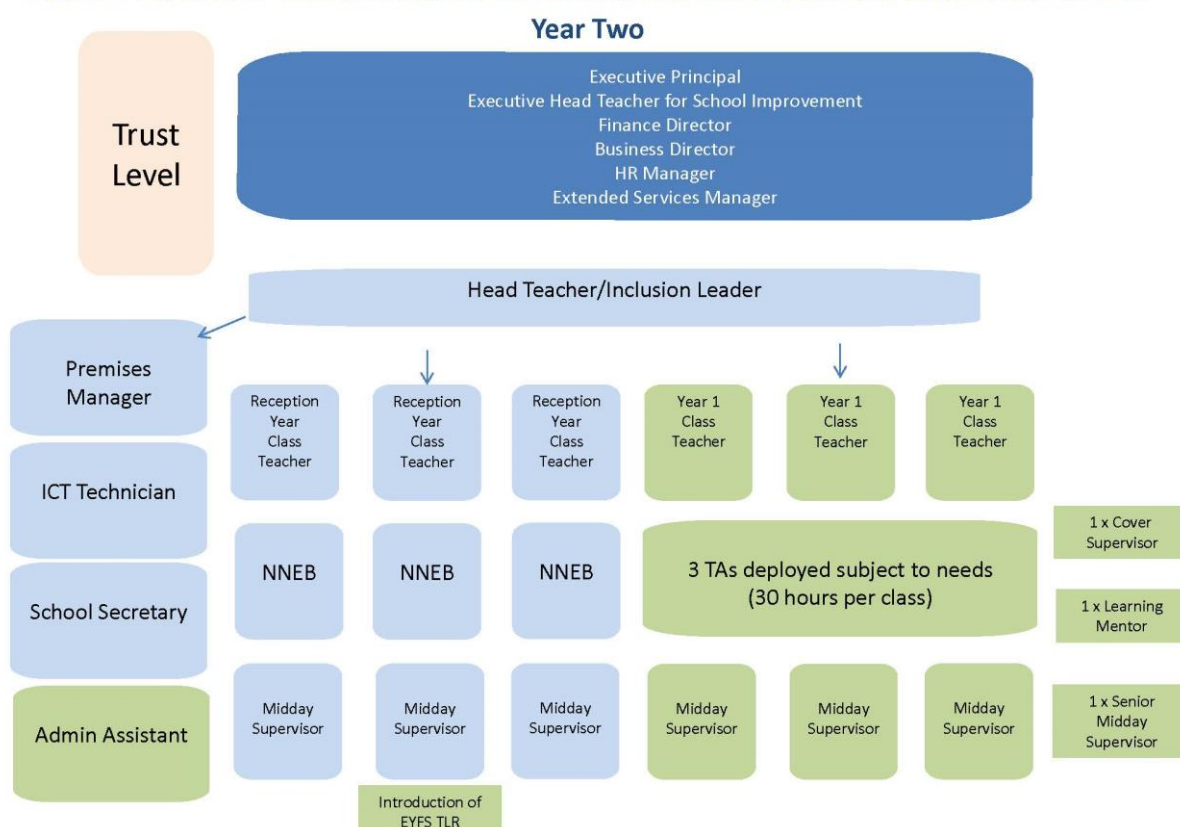
- Aims & Objectives of the Travel Plan
- Rationale behind the Aims of the plan
- Description of the school and its catchment area
- Ethos of the school
- Woodland Trust's adoption of Mayor of London and London Borough of Bexley's transport policies and strategies
- Promotion and use of the walkways and cycle areas as constructed by the Developers
- Post code plan i.e. catchment area of pupils
- Identifying and verifying travel to school patterns and preferences, and carrying out pre- and post-opening surveys of:
 - Parents
 - Pupils
 - Staff
- Evidence of consultation
- Targets for transport mode attainment by staff, parents and children
- Risk Assessment of the plan and of the associated practical actions
- Monitoring and review of the plan
- The rolling action plan addresses:
 - Potential traffic congestion
 - Risk of accidents
 - Need for road safety awareness by children
 - Benefits of walking to school on health, pollution, safety and community grounds
 - Links between Travel Plan and curriculum e.g. School competitions linked to Travel plan, PE promotion and other curriculum links
 - Cycle training, lockable gates and cycle storage
 - Promotion of Bikeability
 - Nomination of a Travel Plan Co-ordinator
 - Future planning as the residential community (and the school) grows
 - Promotion of the Walk to School and WOW scheme (Walk on Wednesday)

Section D3:

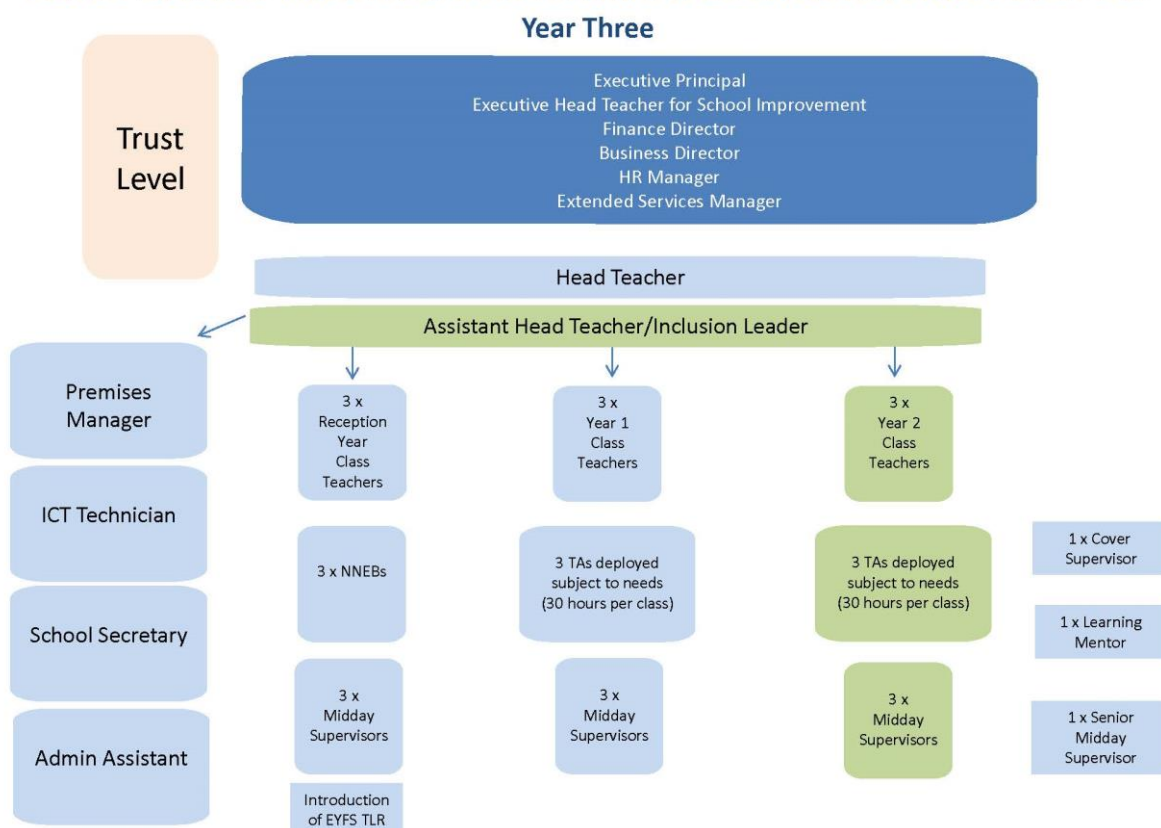
LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2017-18



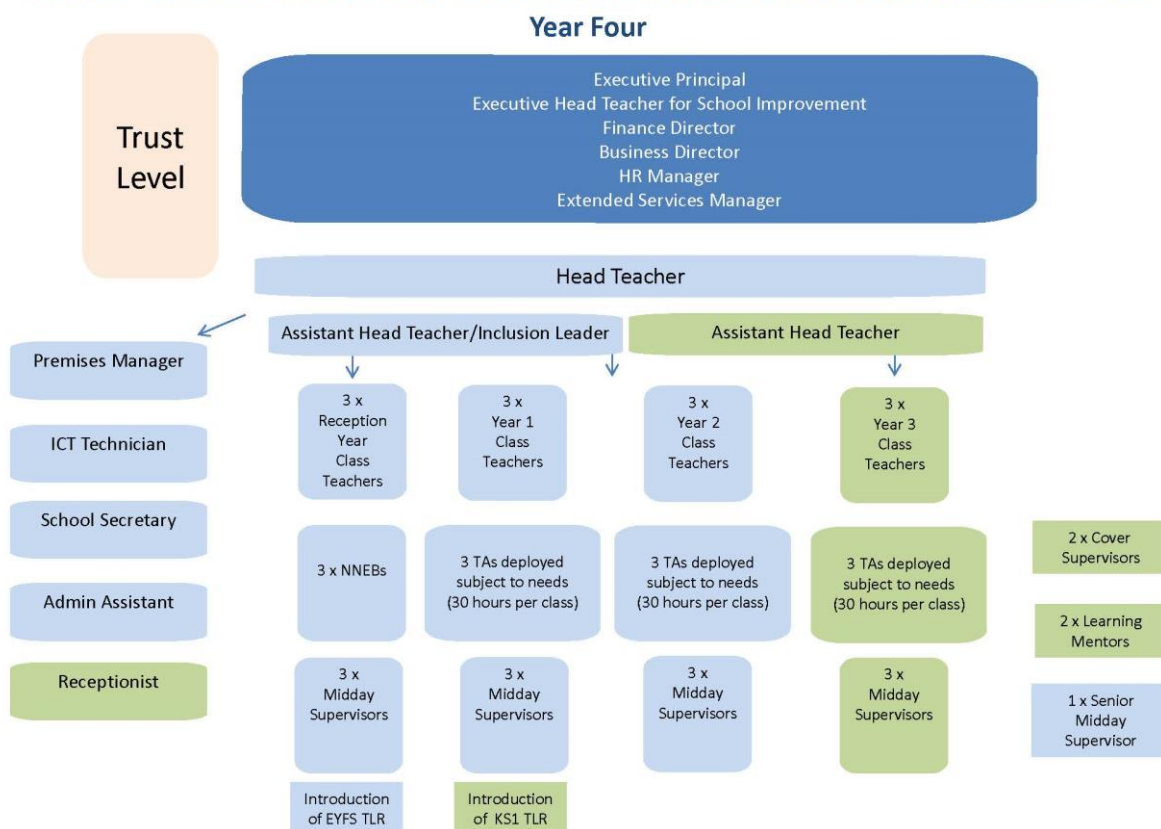
LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2018-19



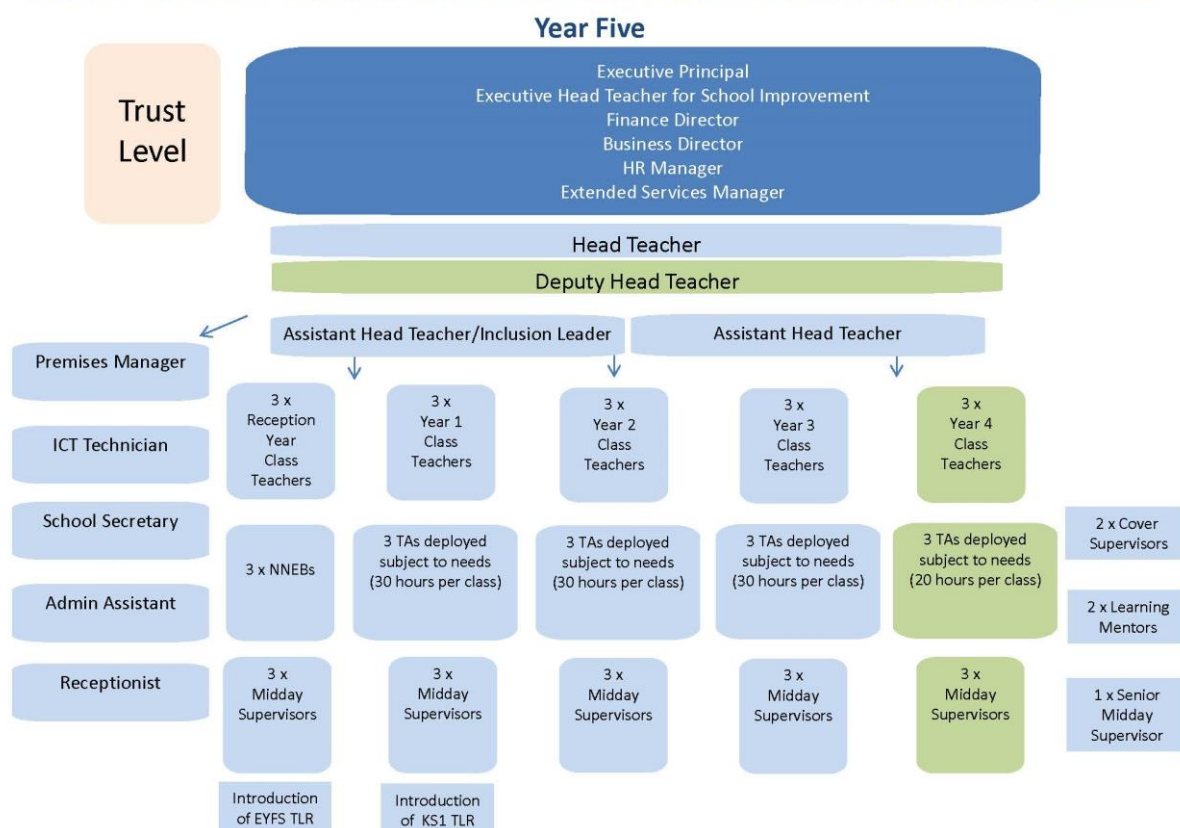
LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2019-20



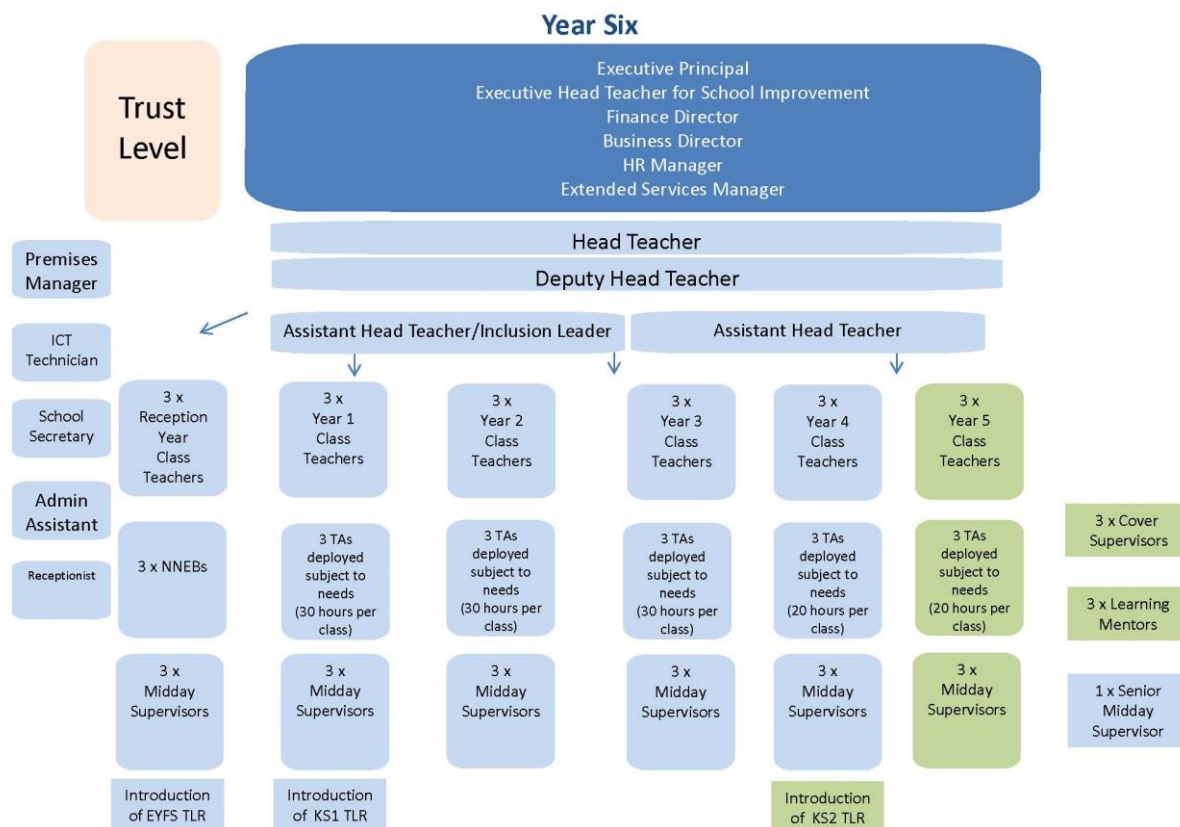
LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2020-21



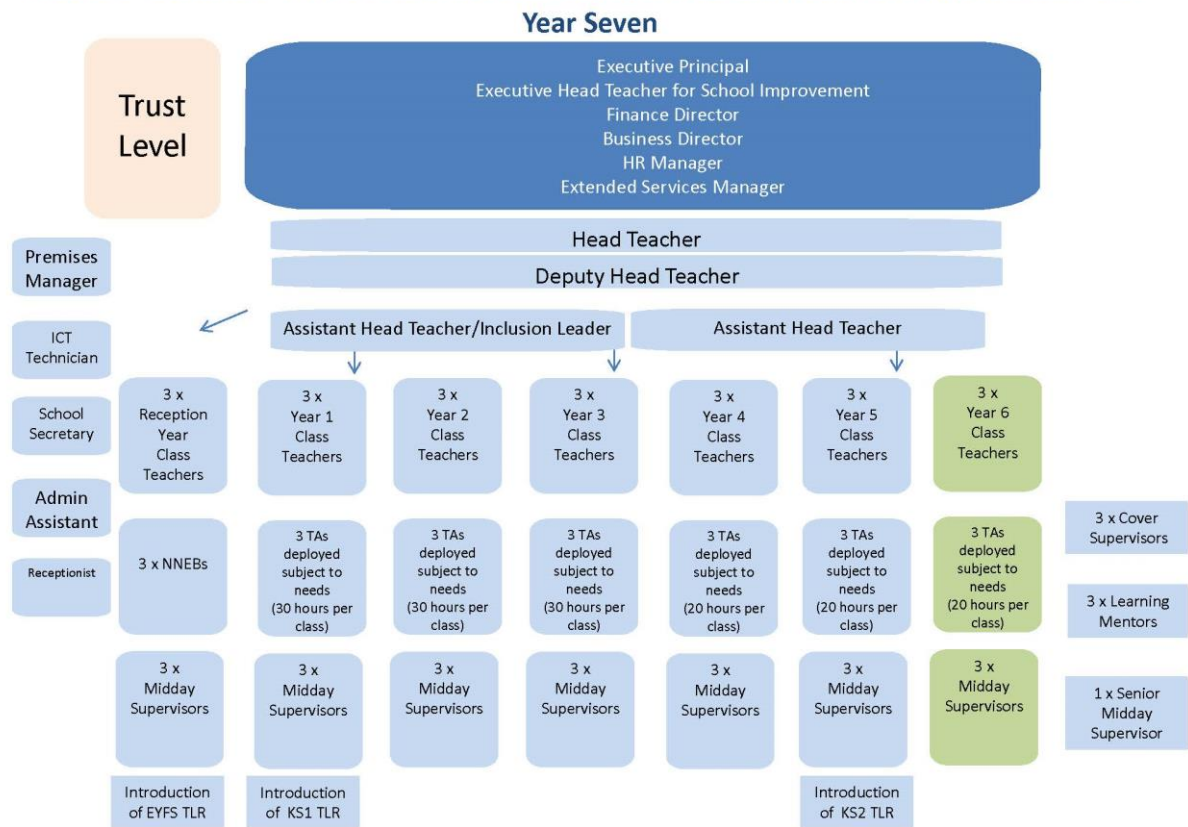
LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2021-22



LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2022-23



LIME WOOD FREE SCHOOL STAFFING STRUCTURE 2023-24



Section D4 (only complete this section if you are proposing a free school with a religious ethos, religious character and those with a distinctive educational philosophy or world view)

NA

Section E: Evidence of need – part 1

Please complete the table on the next page, using the information below to assist you.

This section will need to be completed by both route 1 and 2 applicants.

If your school is new provision:

- In **column A** please provide the proposed number of places in each year group.
- In **column B** please provide the number of children of the relevant ages whose parents have indicated that they will choose the proposed school as their first choice.
- Leave **column C** blank.
- In **column D** please express the demand (column B) as a percentage of the places available (column A). ie $D = (B/A) \times 100$.

If your school is an existing independent school applying to become a free school:

- In **column A** please provide the proposed number of places in each year group.
- In **column B** please provide the number of children already on roll at your school.
- In **column C** please provide the number of children of the relevant ages, who are not currently on roll but whose parents have indicated that they will choose the proposed school as their first choice.
- In **column D** please express the total demand (column B + column C) as a percentage of the places available (column A). ie $D = ((B+C)/A) \times 100$.

| | 2017 | | | | 2018 | | | |
|------------------|------|----|---|-----|------|----|---|-----|
| | A | B | C | D | A | B | C | D |
| Reception | 90 | 90 | | 100 | 90 | 90 | | 100 |
| Year 1 | | | | | 90 | 90 | | 100 |
| Year 2 | | | | | | | | |
| Year 3 | | | | | | | | |
| Year 4 | | | | | | | | |
| Year 5 | | | | | | | | |
| Year 6 | | | | | | | | |
| Year 7 | | | | | | | | |
| Year 8 | | | | | | | | |
| Year 9 | | | | | | | | |
| Year 10 | | | | | | | | |
| Year 11 | | | | | | | | |
| Year 12 | | | | | | | | |
| Year 13 | | | | | | | | |
| Totals | | | | | | | | |

Section E: Evidence of need – part 2

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

Section E1

Please note that sections E1 and E2 will both be dealt with in section E1 as the information required for E2 is not yet available as this is a new build and parental demand does not currently exist as residents have yet to move in. There is however manifold evidence and justification of potential demand and the deficit of quality places outlined in the Anderson 'Planning Statement' document. We enclose extracts in this report from Page 40-44.

The Woodland Academy Trust makes this application on the basis, that:

- Quality education is currently compromised in the immediate area in which we are proposing to locate our free school.
- The construction of a significant residential community (c.600 dwellings) will create demand for even more primary places, especially if these parents come from outside the Borough, and thus won't be in the Borough's predictions, thus exacerbating the shortfall.
- Our local authority is highlighting that:
 - A demographic need exists for more primary places.
 - The borough is a net importer of about 9% primary places.
 - Demand exists for additional reception places until at least 2021.
 - Up to 10 forms of reception classes will be needed by 2021.

We cite the "Commissioning Plan for Education Provision – Planning for Growth, London Borough of Bexley 2015-2017", as a major evidential source.

Salient paragraphs taken from this report include:

'Predicting the number of new places we will need is an on-going challenge as Bexley, along with many others boroughs, experiences a period of demographic change.'

'If numbers in Bexley grow based on current trends, there will be demand for additional reception places until at least 2021 with a potential need to provide at least a further ten forms of entry by 2021.'

'The borough is a net importer of children with 9% of primary and 26% of secondary places taken up by children who do not live in Bexley as at January 2014. Since 2011, 195 new reception places have been created in Bexley.'

'Up to 600 homes are planned for the Erith Quarry site in Fraser Road, over a 10 year period from 2016/17. The developer has undertaken to build a three form entry primary school on the site.'

In addition we can confirm that the Woodland Academy Trust is an approved provider of primary school places in the London Borough of Bexley and that they further cite that: *'With greater autonomy in the education landscape and an increasing number of academies, Bexley Council no longer provides school places directly but instead commissions them from a range of providers including schools, academy trusts and sponsors of academy chains.'*

The Woodland Academy Trust as an approved provider, and because of its track record on opening and running quality schools and education, linked to this special opportunity to service a new school in a new community, our Trust is in an expedient position to support the Borough, its community and its children.

The Borough Council confirmed in the above report that: *"A competition for the management of the (Erith Quarry) school will be held in 2015."* However no such competition has, as at 1st October, been advertised. We have nevertheless contacted the council on a number of occasions, as a matter of protocol, to engage in dialogue and inform them that we would be making a Wave 10 – Free School bid. We have yet to have a formal response, and we feel that, as such a special opportunity has arisen; we should not delay our bid any longer.

We consequently believe that there is a compelling case for approval of this school on the basis of an existence of a published projection, by an authoritative source, as to current and future demand, and that additionally no particular surplus of quality places currently exists.

We also suggest that as both of the two nearest, and relatively close-by Woodland Academy schools, are already over-subscribed, this strengthens our proposal, as does the nature of a 'new build' school in a 'new build' residential development.

We do not believe that by opening a new school in Erith Quarry this will impact on any school in the area that is Ofsted rated as 'Good' or Outstanding', it may however impact schools in 'RI' or 'Inadequate' categories.

We are however mindful that we cannot offer up tangible evidence of current parental demand, and clearly would be unable to do so until houses and apartments are built, and occupiers (with their children), move in. However, through our valuable experience of opening Willow Bank Primary School in an existing estate with no new builds occurring at the time of the school opening we have a proven track record of being able to successfully market our product and thereby gain a pupil roll that will let us balance budgets within one year of opening. Our confidence in being able to fill our school roll comes through our experience.

As additional evidence however, the community developers – the Anderson Group - have produced a very comprehensive report entitled [REDACTED]; On behalf of Anderson Design & Build Ltd - November 2014'. This provides further supporting evidence of potential future demand and current shortfalls.

We now reproduce the complete and relevant education chapter, because of its comprehensiveness:

Principle of a Primary School

8.27 The Government attaches great importance to ensuring that there are sufficient available school places to meet the needs of existing and new communities. The NPPF requires LPAs to take a proactive, positive and collaborative approach to meeting the need for school places and to development that will widen choice in education. It explicitly states that LPAs should

therefore give great weight to the need to create schools, and that they should work with school promoters to identify and resolve key planning issues before applications are submitted.

8.28 The London Plan reiterates the importance of ensuring that the provision of education facilities can respond to rising demand. A strategic priority is therefore to support the provision of early years, primary and secondary school and further and higher education facilities to meet the demands of a growing and changing population. For planning decisions, the London Plan explicitly states that the development of educational facilities which address the current projected shortfall in primary school places will be particularly encouraged. The Draft Further Alterations to the London Plan provides further details of how proposals for education should be considered. It states that development proposals that co-locate schools with housing should be encouraged in order to maximise land use and reduce costs. Furthermore, it identifies that there is a need for 4,000 extra primary classes to be provided across London by 2020.

8.29 The site-specific allocation by the 'saved' policies of the UDP also includes a requirement for the development of Erith Quarry to include educational facilities. More specifically, it is stated in the supporting text of the policy that the proposals will assist in the provision of educational facilities in the north of the borough.

² Refer to paragraph 6.2 of Secretary of State Decision July 1990. Ref: APP/D5120/A/89/130168

8.30 The London Borough is responsible for meeting future demand for primary school education in Erith and the Borough more widely. The London Borough's commitment to ensuring that sufficient community and infrastructure needs are met is set out in policy CS21 of its Core Strategy. It states that:

'The London Borough will ensure the identification, development, completion, safeguarding and monitoring of infrastructure and services that are required to support housing and employment growth in the borough so as to make a positive contribution to creating a strong, cohesive and sustainable community'

8.31 Planning policy at the national, strategic and local level is therefore clear in its support for educational facilities where there is an identified need.

Demand for Primary School Places in the London Borough of Bexley

8.32 In June 2013, the London Borough reported to Cabinet its Commissioning Plan for Education Provision: Planning for Growth 2012 - 2015 which sets out demand for primary and secondary school places and where, if any, identified shortfall exists.

8.33 It was reported that as a result of a combination of demographic factors, including rising birth rates and changing migration patterns, additional pressure on primary school places had been created. Notwithstanding this, the report also highlighted that the London Borough is a net importer of children with 9% of primary school places currently occupied by children who do not currently live in the London Borough, itself creating additional demand for Primary School places.

8.34 Based upon the GLA High Fertility Forecast³ the following shortfall has been identified by the London Borough for reception school places within Bexley.

8.35 The projections identify the need for a further 11 classes to be created in order to meet rising demand up to 2020. The anticipated peak in demand is 2016/2017 in which an additional four classrooms are required at the start of that academic year.

8.36 The report identifies that pressure on school places are increasing across the London Borough, 'although the highest demand remains in the north, notably around Erith [our emphasis], where a new primary school is required⁴.'

³ GLA 2012 High Fertility Population Projections (July 2012)

⁴ Commissioning Plan for Education Provision – Planning for Growth (Page 6)

8.37 The London Plan School Atlas (February 2014) screenshot below illustrates the spatial distribution of primary schools across the north of the Borough. It is clear from the atlas that spatially a Primary School will fill a vacuum. Source: GLA School Atlas (February, 2014)

8.38 The identification of Erith as being under pressure for school places is consistent with analysis undertaken on behalf of the Anderson Group. The table overleaf has been produced analysing publically available data on schools applications in the London Borough and considers the number of application per place made for schools within the Erith and Crayford Educational Area.

| NUMBER OF APPLICATIONS PER RECEPTION CLASS PLACE | | | |
|---|-------------|-------------|-------------|
| | 2011 | 2012 | 2013 |
| Barnehurst | 4.5 | 4.9 | 4.3 |
| Belmont Primary | 6.1 | 6.6 | 5.8 |
| Christ Church Erith | 2.3 | 1.6 | 1.9 |
| Haberdashers' Aske's Crayford | 4.9 | 5.8 | 5.7 |
| Normandy Primary | 1.6 | 1.5 | 1.6 |
| Northumberland Heath | 2.6 | 2.8 | 2.5 |
| Peareswood Primary | 2.0 | 2.2 | 2.2 |
| Slade Green Infant | 1.4 | 1.5 | 1.4 |
| St Fidelis Catholic Primary | 3.2 | 3.2 | 2.8 |
| St Joseph's Catholic Primary | 3.5 | 3.3 | 3.0 |

8.39 The above table highlights a number of schools within the Erith and Crayford planning area in which there are more than three applications per place. The implications of this is that existing local residents within the Erith and Crayford area are faced with increased difficulties in getting their children enrolled within local schools and demand is increasing.

8.40 Whilst the Anderson Group are aware that the London Borough, through small expansions at Northumberland Heath and Peareswood, has sought to meet this demand there remains a demonstrable need for a new Primary School in the area as part of a comprehensive approach to addressing future need.

Primary vs Secondary School

8.41 For secondary schools, the London Borough estimate that there is currently sufficient capacity in the borough, particularly when this is considered alongside expansion plans in surrounding boroughs. They therefore do not anticipate a requirement for a new secondary school up to the end of the decade. Spatially, the immediate area to the application site is well served with Trinity Church of England School (Erith Road) in very close proximity.

8.42 It is clear that the more pressing need both demographically and spatially both within the borough and Erith is for a primary school rather than a secondary school. This has been made clear from our discussion with the Council and the evidence provided.

A New School at Erith Quarry

8.43 The Anderson Group has had extensive discussions with the London Borough in respect of the proposed provision of a 3-Form Entry Primary School as part of the development of Erith

Quarry. The school will be built out by the Anderson Group as part of Phase 1 of the development and will be passed to the London Borough through a Section 106 Legal Agreement.

8.44 The school facility will also include playing grounds, a sports pitch with undercroft car parking and a multi-use games area (known as a MUGA). It should be clarified that while the residential component of the development will generate a child yield to broadly require a 1-Form Entry Primary School, the provision of an additional two forms of entry will greatly assist in alleviating the pressure for local school places.

8.45 The Anderson Group has an aspiration for the sports and ancillary facilities associated with the school, including the MUGA, to be made available to the community outside of school hours. The Anderson Group understand that the London Borough is to include this requirement as part of the tender process to identify the provider.

Meeting Current Identified Demand

8.46 The London Plan is clear in its encouragement of educational establishments where there is a projected shortage. As noted above, as of June 2013, it was identified that a further 11 reception classes are needed in order to meet demand up to 2020. While some of this demand is to be met by small scale expansions of existing facilities, there remains a geographically specific need for new education provision, specifically a Primary School, in the Erith area.

8.47 The proposed Primary School as part of the development at Erith Quarry would not just meet the identified demand for the north of the area; it would also, subject to securing planning permission, be delivered to assist in meeting the current peak in demand for primary school places. It is planned that the school will be brought forward in four staged phases. It is envisaged that phase 1 will be opened for September 2017 and will constitute 3 classrooms. An additional 4 classrooms will be made available for September 2018. 1 Form of Entry will then be made available for September 2019, with a further Form of Entry for September 2021.

8.48 Following discussions with the London Borough's Officers, it has been confirmed that no other proposals have been put forward for a new Primary School in Erith, and to the north of the borough more generally. The proposed 3-Form Entry Primary School at Erith Quarry offers a comprehensive solution for relieving school place pressures and reduces the need for incremental, piecemeal expansion of existing school facilities which often represents sub-optimal solutions.

8.49 For the reasons set out above, the proposed Primary School at Erith Quarry directly responds to the identified need for a new school within the Erith area and demonstrates the proactive, positive and collaborative approach to meeting the need for school places identified in the NPPF. Further to this, the proposed phasing of the development would also lead to the school opening in accordance with the peak of primary school demand in the borough.

Meeting Future Demand

8.50 Notwithstanding the above, it is important to consider the future growth direction in Bexley beyond 2020. As set out in the Core Strategy, and as further reinforced by the identification of Thamesmead and Abbey Wood and Bexley Riverside as Opportunity Areas within the London Plan, the north of Bexley is identified as being capable of absorbing much of the future projected growth.

8.51 With a particular focus upon the Bexley Riverside Opportunity Area, the proposed Primary School at Erith Quarry would be strategically located to help absorb education place demand arising from the long term growth of this area and its surroundings.

Conclusion

8.52 Erith Quarry is allocated by the 'saved' policies of the UDP for, amongst other things, educational facilities. As presented above, there is an identified and demonstrable urgent need for a Primary School within the Erith area. The Anderson Group therefore considers that the proposed inclusion of a 3 form entry primary school as part of the sustainable mixed use development of the Erith Quarry accords with the NPPF, Development Plan and other material considerations.

THE LOCAL CONTEXT & MICRO-LEVEL DEMAND

The ongoing challenge for the London Borough of Bexley's school place commissioning has been to decide the basis on which to plan and expand school places over the next few years. Given the scale of demand, and uncertainty around future demographic change, the previous policy to base their planning on the GLA High Fertility population model for the Borough, plus 5% additional capacity (based on Education Funding Agency (EFA) guidance), has been reviewed and tested against actual numbers as identified in the school census. As a consequence, and to ensure the viability of all our schools, the programme for 2015 –17 will use the GLA Alternate Population Model with 2.5% additional capacity.

Using the new methodology, they and we estimate that Bexley will need to provide at least a further ten reception classes by 2021. Plans are being progressed to finalise locations for two additional Reception classes for September 2015.

At this stage, bulge classes in higher years have not been planned for formally, but the Council is aware of those schools with the physical capacity to help, should this be required. We will continue to use clusters of schools in a locality, rather than individual institutions, as the basis on which to plan for new places. Our options to do so are, however, increasingly limited as our programme has developed over recent years reducing the number of schools with remaining capacity.

Our analysis shows that pressures on school places are not isolated but are arising across the Borough and across year groups. Our challenge is to assess if this will continue at current levels, which would suggest the need for permanent expansions, particularly where new housing is already known to be planned, such as at the now authorised Erith Quarry site, or stabilise and even reduce, in which case bulge classes may be more appropriate in some locations.

Further expansion will be necessary to accommodate the projected larger Reception intakes, either as bulge classes or permanent expansions, at least until 2020. The scale and speed of expansion is unprecedented in Bexley and has impacted on communities, schools and workloads.

It is becoming increasingly difficult to find suitable sites for further primary school expansion. Some are too small to accommodate additional building, or expansion would cause unacceptable traffic difficulties in the local area. A new free school within a 'new build' residential area presents an attractive and exciting opportunity.

Section E2

Please see E1 above.

Section F: Capacity and capability

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

All applicants must complete sections F1-F8 as set out in the table below:

| Type of applicant | Which sections to complete |
|--|----------------------------|
| Route 1 applicants (both single and multiple) | F1-F6* |
| Route 2 applicants applying for one free school in this round | F1-F4* |
| Route 2 applicants applying for more than one free school in this round | F1-F6* |
| Route 2 applicants applying for one free school in this round who already have an open academy | F1-F6* |
| Independent schools wishing to 'sponsor' a new free school | F1-F6* |
| Independent schools wishing to become free schools | F1-F4 and F7-F9 |

* If you are an approved academy sponsor the department will already hold material that would be relevant to your free school application and will therefore not expect you to provide this information for a second time. As a result at this point do not fill in sections F5 and F6 of the application relating to your educational track record until we have assessed whether we already have enough information on these aspects of your performance. If required, we will make sure that we give you sufficient time to provide any clarification or additional material to help us take a view in regard to these factors.

In addition if you are not an approved academy sponsors but are interested in finding out more about this role and potentially apply to become a sponsor please make contact with the department's [Sponsor Approval team](#).

It is important to make clear that approval as an academy sponsor will not guarantee a free school application is approved. Each free school application is considered against

the criteria set out in this guidance. Similarly, approval to deliver a free school project does not mean that you would be automatically chosen to deliver a specific academy project. All projects are carefully considered on a case-by-case basis. It is the role of the department to consider which of our sponsors will provide the best possible solution for a particular school(s), and ministers will make a final decision as to whether the proposed sponsor should take forward a specific project, based on that advice.

There are some tables below which you must also complete. These relate to F1, F3 and F6. Please feel free to add additional lines to these tables as required.

F1 (a) Pre-opening skills and experience

Complete table and provide a short commentary on your plans.

You must complete a separate line for each member, trustee and anyone else that is part of your project group. Please include CVs for all named individuals in the annex. Guidance on what should be included in each CV is in the assessment criteria booklet and a template is included as an annex to this document.

| Name | Member of core applicant group (Y or N) | Where live (town/city) | Role(s) in pre-opening | Summary of relevant expertise | Available Time (hours per week) |
|------------|---|------------------------|--------------------------|--|--|
| [REDACTED] | Y | Orpington | [REDACTED] | [REDACTED] joined the Trust in 2011 and has a wealth of experience in [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]. Prior to 2011, [REDACTED] was the [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] | 5 |
| [REDACTED] | Y | Sidcup | [REDACTED] [REDACTED] | [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]). Her career then progressed through phase [REDACTED] | Pre-start-up and during the development phase [REDACTED] |

| | | | | | |
|------------|---|-------------|--|--|---|
| ██████████ | Y | Frome | ██████████ ██████████ ██████████ | <p>██████████ who works in ██████████, was ██████████ in December 2010 and is the ██████████. ██████████ also sat as ██████████ and brings a level of fairness and consistency to the Governing Body, offering support and challenge as appropriate and driving to get the best for all pupils and staff in the Trust.</p> | 10 |
| ██████████ | Y | Bexleyheath | ██████████ ██████████ ██████████ ██████████ | <p>██████████ started his ██████████. ██████████ held a series of leadership posts before being appointed ██████████ in 2005. In 2007 he was ██████████, which had been judged as 'Special Measures' after an Ofsted inspection. ██████████ worked with the senior leadership team and the incoming Head Teacher to start the task of turning the school around. ██████████. In 2009</p> | As needed as the school would be part of the Trust. ██████████ will be working closely with the Head Teacher who will have both strategic and operational roles. There will be a gradual transition into the Head |

F1 (b) Skills gap in pre-opening

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section. Please add additional lines as required.

| Skills/experience missing | How you plan to fill the gap |
|---------------------------|--|
| NA | NA but please see the statement on skills, shown in the following narrative. |
| | |
| | |
| | |
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Section F2

The Trust governance structure consists of the Members overseeing overall control of the Trust's development and progress with a Board of Directors who oversee the work and quality of the Local Governing Bodies (LGBs) performance. Directors delegate specific responsibilities to the LGBs and have delegated the ultimate responsibility to the Executive Principal for the day-to-day management decisions supported by the Leadership Team. The work also encompasses the Academy Sponsor role of Northumberland Heath Primary School. The day to day running of each academy is undertaken by that academy's Head Teacher supported by their Senior Leadership Team.

The Board of Directors are responsible for overseeing the management of the Schools' budgets, accounting records and systems of control. It establishes, maintains and develops the Trust's financial policies and accounting and budgetary systems in accordance with the Academies' Financial Handbook. It monitors the overall performance of the Trust against the objectives of the Schools' Improvement Plans and ensures the Members are kept apprised of national developments in relation to finance.



Members

- appointing directors to WAT Board
- acting as national/regional “ambassadors” for the MAT
- acting as a last line of resort in holding the Board to account

Board of Directors

- strategic oversight, setting vision and policies for MAT
- ensuring appropriate governance and decision making
- dealing with contractual relationships with third parties
- ensuring compliance with all regulatory requirements
- oversight of standards & outcomes of academies
- setting appropriate targets and holding local leadership to account
- reviewing performance across the academies & MAT
- agreeing and monitoring budgets.

Academy LGBs

- “day-to-day” oversight of running of the Academy.
- carrying out the MAT’s vision policies and priorities.
- holding local academy leadership to account for academic performance, quality of care & provision.
- overseeing & monitoring the effectiveness of local strategies.
- seeking value for money & ensuring resources are applied appropriately at academy level.
- supporting the Board in relation to proper use of funds & delivering high quality educational provision.

Executive Principal

- responsible for leading the development and delivery of WAT’s long-term strategy
- ultimate responsibility for all day-to-day management decisions and for implementing WAT’s long and short term plans
- acting as a direct liaison between the Board and local management of the academies
- communicating to the Board on behalf of local management
- key communication role on behalf of WAT with local stakeholders, regulatory bodies and government
- ultimate responsibility for ensuring the proper use of public funds
- ultimate responsibility for assessing and reporting to the Board on risks
- ultimate responsibility for delivering excellent educational provision

Meeting Structure

- 1 Development Forum
All LGBs to attend with invites to Directors & Members.
Purpose - to see a school in action & receive governor training.
- 2 LGB Meeting
All on same day but staggered start times
Purpose - turbo charged curriculum & achievement committee
- 3 Board of Directors Meeting
Held shortly (few days/one week) after 2
Preceded by board committees earlier that day - premises, finance, personnel & pay (Autumn)
Purpose - check and balance on Trust & LGB performance plus strategic leadership
Half-term
- 4 Members Gathering
Board Chair and Executive principal meet with members with set agenda to update members on overall performance
- 5 Board of Directors Meeting
* In Autumn term there will be additional Audit Committee and Board meeting to deal with approval of audited accounts.

In accordance with the articles, the Trustees of the charitable company The Woodland Academy Trust are the Members who comprise:

- a) The Members of the Company on the date of the adoption of the Articles of Association;
- b) The Chairman of the Board of Directors
- c) Any person appointed under Article 16

The Board of Directors comprises the following Directors and they were appointed as follows:

- a) 5 Directors appointed by Members
- b) The Executive Principal
- c) The Executive Head Teacher for School Improvement
- d) 2 Academy Directors who are appointed Chairs from 2 Local Governing Bodies

When a vacancy arises, the Members and Directors seek to make an appointment that would maximise the relevant skills and experience on the board as a whole and enable it to comprise appropriately qualified and experienced Directors.

Most of our Directors and Members are local and live in the London Borough of Bexley whilst our local governing bodies' stakeholders mostly live within the immediate locality of their individual school.

Our Members, Directors and Governors have a wide range of skills and areas of expertise. Skills Audits are conducted annually to ensure that any gaps in skills or experience are identified swiftly. The audits are then analysed and discussed with Directors who then decide if further training or recruitment of new Governors is required.

Conflicts of interest are explored when any person joins our governance structure as well as at the beginning of each meeting and with the circulation of agendas. Any person, whether individually or through connectivity, who is deemed to potentially benefit from any agenda item of business, withdraws from that part of any meeting as well as not having papers related to the item distributed to them prior to the meeting.

A Local Governing Body would be appointed for Lime Wood Free School following this model of governance thus Lime Wood Free School's governing body would form a Local Governing Body as part of our Trust. At present we have a Board of 5 Members, a Directors' Board of 9 Directors which is then informed by the work of our schools' Local Governing Bodies, each consisting of 9 Governors drawn from our Directors and the local community and stakeholders of each school.

Our most recent skills audit has indicated that finance and risk skills are well represented within our Directors' skills set but we only have one Director who is linked to Human Resources within his work role. This is an area of expertise that is currently being sought through recruitment with SGOSS and Academy Ambassadors. Training which has taken place over the last four terms is as follows:

- Governor Induction, and Chair and Vice Chair Training
- Local Governing Body Framework
- Review of Governance
- Trust Developments Plans
- Overview of Academy Finance
- Safeguarding
- Safer Recruitment
- Behaviour and Safety Review
- British Values
- Equal Opportunities
- Sports Funding
- Pupil Premium Grant Funding
- Impact of Free School Meals
- Supporting Pupils with Medical Conditions
- Performance Management, Pay Decisions and Appeals
- Pupil Exclusions and Appeals
- RAISEonline
- Pupil Progress Data
- Academy Website Content
- Health and Safety

F3 (a) Proposed trustees

Complete table and provide a short commentary on your plans.

You must complete a separate line for each person that will be on the board of trustees, including your proposed chair of the board if you have one. If this application is for a free school that will form part of a multi-academy trust you must provide information for the individuals on the MAT board and the individuals on any local governing body, and ensure that you have shown clearly on which board each individual will sit. Please include CVs for all named individuals in the annex. Guidance on what should be included in each CV is in the assessment criteria booklet and a template is included as an annex to this document.

| Name | Where live (town/city) | Role on board of trustees | Role(s) in pre-opening | Summary of relevant expertise | Available Time (hours per week) |
|------------|------------------------|---------------------------|------------------------|---|---------------------------------|
| ██████████ | Orpington | ██████████ | ██████████ | <p>██████████ ██████████ and has a wealth of experience in ██████████ ██████████ ██████████ in ensuring they meet and exceed their safeguarding obligations. ██████████ ██████████ ██████████ ██████████ ██████████</p> | 5 |

| | | | | | |
|-----------------------|-------------|-----------------------|-----------------------|---|----|
| | | | | <div>████████████████████</div> <div>████████████████████</div> <div>████████████</div> <div>████████████████</div> <div>████████████████████</div> <div>████████████████</div> <div>████████████████</div> <div>████████████████</div> <div>████████████████</div> <div>████████████</div> <div>████████████████</div> <div>██████████</div> | |
| <div>██████████</div> | Bexleyheath | <div>██████████</div> | <div>██████████</div> | <div>████████████████</div> <div>████████████████</div> <div>████████████████</div> <div>████████████</div> <div>████████████████</div> <div>████████████</div> <div>████████████████</div> <div>where he represents the interests of schools in Bexley. ██████████ has a special interest in the finance and audit work of the Trust, as well as</div> <div>████████████</div> <div>████████████</div> <div>██████████</div> | 10 |

| | | | | | |
|------------|-------|------------------------------------|------------|--|----|
| | | | | <p>██████████ and driving accountability and fairness. ██████████</p> <p>██████████ strives to contribute to the lives of children and allow them to have the best shot at achieving what they want to achieve.</p> | |
| ██████████ | Frome | ████████████████████ ██████████ | ██████████ | <p>████████████████████ ████████████████████ ████████████████████, was appointed to the ██████████ in December 2010 and is the ██████████ ████████████████████ ████████████████████ ████████████████████ ████████████████████ ██████████ ████████████████████ ████████████████████ and brings a level of fairness and consistency to the Governing Body, offering support and challenge as</p> | 10 |

| | | | | | |
|------------|-----------------|------------|------------|---|---|
| | | | | appropriate and driving to get the best for all pupils and staff in the Trust. | |
| ██████████ | Shoreham-by-Sea | ██████████ | ██████████ | <p>██████████ ██████████ ██████████ and has a proven record of innovation and transformation as part of the school improvement process, leading three schools through to academy status. ██████████ provides the Trust with advice, guidance and executive leadership. In ██████████ ██████████ ██████████ ██████████ and has ██████████ ██████████ on aspects of educational leadership and</p> | 1 |

F3 (b) Skills gap for board of trustees

NB: If you do not have a proposed chair of the board please include details of the relevant skills and experience that you will be looking for in this table.

| Skills/experience missing | How you plan to fill the gap |
|---------------------------|--|
| NA | NA |
| | Our Members, Directors and Governors have a wide range of skills and areas of expertise. Skills Audits are conducted annually to ensure that any gaps in skills or experience are identified swiftly. The audits are then analysed and discussed with Directors who then decide if further training or recruitment of new Governors is required. |

Section F4

The identified Head Teacher is already employed within the Trust and, if our bid is successful, this person will be working towards the opening of Lime Wood Free School as well as being in place as the Head Teacher from day one of the pupils being admitted. The CV for the Head Teacher designate is attached in the Annex.

The role of the Head Teacher and the skills required to fulfil this role are as follows:

| | |
|------------------------|--|
| Job Title: | Head Teacher, Lime Wood Free School |
| Category: | Senior Leadership |
| Pay Range: | In line with current STPCD |
| Hours/Weeks: | 32.5hrs/52wks |
| Manager: | Executive Head Teacher/Governors |
| Direct Reports: | SLT, Teaching and Support Staff |

Job Purpose

- To act as appropriate and to undertake all responsibilities and professional and decision making duties of a Head Teacher.
- To support, advise and work in partnership with the Executive Head Teacher, as the lead member of the school's Senior Leadership Team, in all matters relating to the efficiency and effectiveness of the whole school, and to lead the school in rigorous self-evaluation.
- To provide professional leadership for the school on a day to day and long term basis, securing its success and improvement, ensuring high quality education for all its pupils by improved learning and achievement.
- To take corporate responsibility for the organisation, administration and management of the whole school on a day to day basis.
- To take the lead at this time of immense change involving:
 - Induction of new staff in a range of roles.
 - New computing curriculum.
 - New National Curriculum.
 - Assessing without levels.
 - Performance Related Pay.
 - Introduction of the World Class Teacher Award criteria as the basis of the Trust's performance management procedures.

Duties and Responsibilities

- To lead on assessment and to initiate appropriate support and training for all teaching staff in the development of effective AfL procedures to move pupils forward in their progress and learning.
- To be responsible for the daily management and organisational procedures of the school.
- To work with the school's senior leaders and the Executive Head Teacher to formulate, monitor and review the School's Improvement Plan.
- To be a strong role model, committed to raising standards of achievement, generating an atmosphere of focus, drive and high expectations.

- To be fully involved in the selection, and management, of staff and support the Executive Head Teacher with the Performance Management cycle.
- To be a member of the Trust Senior Leadership Team, taking an active role in developing the shared goals of the school, building on existing strengths and working with the Executive Head Teacher and alongside the Trust's other Head Teachers, in order to develop a clear sense of purpose and direction in order to move each of the schools forward.
- To ensure that all new staff are effectively inducted, liaising with the HR Manager to ensure that the Trust's induction proforma is completed and handed to the School Secretary for filing in the personnel files.
- In partnership with colleagues, to organise and maintain timetables and rotas regarding school procedures to ensure the effective use of time, personnel and resources. Including overseeing that rotas and timetables are prepared in readiness for each new term/new year and in delivering assemblies as a member of the assembly rota. This also relates to communal areas/hall display boards co-ordination.
- To organise for all support staff to have regular and planned meetings with the Inclusion designated SLT member, to ensure clear lines of communication.
- To ensure that up to date and accurate information is passed to staff relating to the daily events and running of the school.
- To meet, as necessary, with the Executive Head Teacher, and/or the other Head Teachers to discuss future plans and events.
- To maintain and promote high standards of behaviour and consistent disciplinary procedures as set out in the school's Behaviour and Anti-Bullying Policy.
- To provide such additional duties as may be appropriate, following consultation with the Executive Head Teacher.
- To ensure that NQTs/Overseas Teachers/Teach First/School Direct, and work-experience colleagues, are effectively mentored.
- To liaise closely with the Executive Head Teacher and the Pupil Advocate Leader in the co-ordination of the school's PSHE/SMSC/SEAL agendas and the facilitation of regular, minuted School Council meetings and overseeing the upkeep of a topically current pupil voice displays/noticeboards.
- To ensure the formulation of a timetable, and daily practice concerning, a Collective Act of Worship; to ensuring that assemblies are co-ordinated across the school week and throughout the year to ensure that the school meets its statutory duty.
- To oversee the development, and raising, of the school's profile within the community.

Activities

'Closing the Gap' Responsibilities:

- In consultation with the Executive Head Teacher and other appropriate staff: -
- A commitment to inclusion for all, including effective line-management of the school's Inclusion Leader to ensure efficient use of time and resources. Ensuring that the line management of the Inclusion Leader leads to proactivity on that leader's part ensuring that no gaps widen but do, noticeably, close.
- To be involved in the provision, and data analysis, for the more-able and gifted and talented pupils across the school.

- Liaise with the Trust's Inclusion Leaders to ensure that all external agencies involved with the provision of support for any pupil groups within the school are utilised fully for the pupils' benefit.
- Prepare a detailed, termly report for Governors on the school's performance which includes information on all groups including SEN, CLA, FSM, Gender and G&T/more-able provision.
- To liaise closely with the Inclusion Leader to co-ordinate allocation of Teaching Assistants to support all pupils, in all groups, throughout the school.
- To ensure that any funding allocated is deployed appropriately in respect of applying the principles of the PPG allocation, providing an annual report for parents and Governors that is made available on the school's website prior to Autumn 1 each year.

Identification of Pupils:

- To meet at least half-termly with individual teaching staff in order to identify and monitor pupils, through appropriately challenging pupil progress meetings.
- To oversee the maintenance of at least termly G&T and SEN Profiles and to monitor that the appropriate children are appearing on those profiles.
- To work with the school's Inclusion Leader to gather and collate available information e.g. SATs and other formal assessments from transfer schools, to facilitate early identification of pupils regarding G&T, additional educational/special needs, CLA, emotional difficulties or EAL.
- Each term, to formally evaluate all interventions' effectiveness based on a measurable sub-level/APS basis using the Incyte SESR programme as appropriate.

Administration:

- To liaise with the Executive Head Teacher to ensure that the school's Self Evaluation documentation is fully updated twice during each calendar year.
- Ensure the maintenance of the school's G&T and SEN Profiles. Provide information regarding all pupil groups to the Executive Principal, Department for Education and governors as required.
- To annually proof-read, amend (if necessary), comment upon and sign each pupil's annual report.
- To meet with the Financial Director when appropriate to ensure that PPG and Sports Funding is used to best effect and reported accurately.
- To be mindful of deadlines in both themselves and others.

Liaison

- Ensure that accurate and relevant information is communicated to staff as appropriate.
To meet with parents and carers, as appropriate.
- Liaise with all outside agencies, as appropriate, to support pupils and staff.
- To ensure PEP meetings take place within the 6 months' time-frame for all CLA pupils.
- To liaise with SEAAS to enforce the school's Attendance Policy, this includes attendance at Fast Track meetings.
- Liaise with the Trust's Inclusion Leaders, and class teachers, to: -

- Coordinate teaching groups
- Arrange timetables for best use of support time
- Prioritise pupils for inclusion in withdrawal groups
- Liaise with subject and year leaders to support specific aspects of the curriculum.
- Ensure efficient and relevant records and assessments are undertaken for pupils with whom they work
- Interviewing new appointments.
- To liaise with any Learning Mentor support, on a day to day basis in passing but also, in a formal meeting that is minuted at the end of each half term.
- When needed, to work with external providers in the development of specific projects within the school e.g., CAMHS, etc.

Monitoring and Evaluation:

- To be mindful of the Trust's Monitoring & Evaluation Policy.
- To have an up to date, and working, knowledge of the Ofsted Handbook of Inspection and the accompanying Ofsted Framework and Safeguarding Guidance, applying this insight to the standards and practice seen within your own school, and that of the other schools within our Trust.
- To make judgements concerning the validity of interventions, and other alternative/off-site provision, through pupils' progress data.
- To undertake lesson observations in line with the Trust's Classroom Observation Policy.
- To triangulate and compile all monitoring outcomes in the school's central Monitoring and Evaluation File.
- To work with the Executive Head Teacher, and to fully participate in the half-termly Incyte meetings, using all of the above to inform those meetings.
- To participate in the Trust's Internal Reviews of the other schools within the Trust.

Resources:

- Update your professional knowledge and expertise as necessary and appropriate.
- To work with the Executive Principal and the Trust's other Head Teachers to plan for staff training on a range of achievement issues and other related aspects.

General:

- Be a 'critical friend' to other Senior Leaders and Head Teachers.
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
- Contribute to the overall ethos/work/aims of the school.

Person Specification

Head Teacher, Lime Wood Free School

| | Essential | Desirable |
|---|--|-----------|
| Education, Qualifications and Training | <p>DfE recognised teaching qualification and the NPQH qualification.</p> <p>A commitment to their own professional development through continuous personalised learning including enrolment upon the NPQH course.</p> | |
| Experience | <p>To have a working knowledge of EYFS & Primary Key Stages.</p> <p>A clear understanding of the changes related to the SEN Code of Practice, the National Curriculum, assessment beyond levels and the recent changes to the Ofsted Common Inspection Framework (CIF).</p> <p>Good understanding of recent curricular and educational developments, including strategies for improvement in pupil attainment across the curriculum.</p> <p>An understanding of the importance of tracking and promoting pupil progress.</p> <p>Ability to analyse, use and share statistical data to meet the needs of all abilities.</p> <p>Use ICT effectively to support strategic school management.</p> <p>To be fully conversant with the Ofsted Criteria as noted in which ever is the current Ofsted Framework at the time.</p> <p>Experience of being involved in CAFs, Core Group meetings etc.</p> | |
| Knowledge and Skills | <p>Knowledge and understanding, gained through experience and the reading of research, related to:</p> <ul style="list-style-type: none"> • Safeguarding • Child development • Assessment for Learning | |

| | | |
|---------------------------|--|--|
| | <ul style="list-style-type: none"> • Curriculum innovation • Performance Management and the link to PRP • Academy sponsorship <p>Incisive questioning</p> <p>High quality, accurate, evaluation of data</p> <p>Strategic planning and accurate evaluation of the resulting plans</p> <p>Intuitive, and confident, decision making</p> <p>Highly IT literate</p> <p>Ability to deliver clear messages including the ability to have difficult conversations</p> <p>Unrelenting commitment to and understanding of the pursuance of excellence and how to move forwards, continually raising standards for all children – embedding ambition at all levels.</p> <p>Ability to create a culture in which the school community are excited, engaged and actively motivated by learning.</p> | |
| Personal Qualities | <p>The capacity to work autonomously through demonstrating the personal qualities of:</p> <ul style="list-style-type: none"> • Self-awareness: emotional self-awareness, accurate self-assessment, self-confidence • Self-management: emotional self-control, transparency, adaptability, achievement orientation, initiative, optimism, resilience, intrinsic motivation • Social awareness: empathy, organisational awareness, service orientation • Relationship management: developing others, inspirational leadership, change catalyst, influence, conflict management, team work and collaboration. • The ability to adhere to deadlines | Hobbies and interests outside of work. |

| | | |
|------------------------------|--|--|
| | <p>and to demonstrate good time management, particularly related to arriving on time to meeting and appointments, thus setting an example for others to follow.</p> <ul style="list-style-type: none"> • To be inspirational in their ability and their zest for life. • High emotional intelligence • Good sense of humour | |
| General Circumstances | <p>Professional appearance as the nature of the Trust.</p> <p>The post entails being sympathetic, and committed, to the Trust's vision and philosophy.</p> <p>Understanding of safeguarding and its importance within an educational setting.</p> <p>Awareness and understanding of equality and diversity.</p> | |

Section F5 (existing providers and any new applicants seeking to open more than one free school)

APPROVED ACADEMY SPONSOR – COMPLETION OF THIS SECTION IS NOT REQUIRED AT THIS STAGE

F6 (existing providers and any new applicants seeking to open more than one free school)

APPROVED ACADEMY SPONSOR – COMPLETION OF THIS SECTION IS NOT REQUIRED AT THIS STAGE

F6(a) Shared services

You must complete a separate line for each person that will be in the central services team. Please include CVs for all named individuals in the annex. Guidance on what should be included in each CV is in the assessment criteria booklet and a template is included as an annex to this document.

| Name | Role in central service team by area(s) of expertise (e.g. educational, financial, etc.) | Other relevant area(s) of expertise | Hours per week | Cost £ |
|------|--|-------------------------------------|----------------|--------|
| NA | | | | |
| | | | | |
| | | | | |
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| | | | | |
| | | | | |
| | | | | |

F6 (b) Shared services

Use the table below to provide details about the total running cost of your shared service, and how this is made up from contributions. Please add additional lines as required.

| Name of school | Budgeted contribution to MAT shared service | |
|----------------|---|---------|
| | 2017/18 | 2018/19 |
| NA | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | £0.00 | £0.00 |

Section F7 (Independent schools) NOT REQUIRED

Insert text. Complete self-assessment forms as an annex.

Section F8 (Independent schools) NOT REQUIRED

Insert text. Submit other information as an annex

Section F9 (Independent schools) NOT REQUIRED

Insert text. Submit plans and other information as an annex

Section G: Budget planning and affordability

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

You need to demonstrate that the school will be viable within the expected levels of funding available both while it builds up and when it is at full capacity. You must provide an overview of how you developed your plans and the thinking behind them. As part of this, you should explain how you have delivered value for money, and describe how your budget plans support your education vision and plan. In addition you should complete the excel budget templates.

Sections G1

1. Overview of the financial plans for Lime Wood Free School

The Woodland Academy Trust has drawn on its wealth of knowledge and experience, of developing and running three schools, in now preparing the financial plans for Lime Wood Free School.

Willow Bank Primary opened as a two form new sponsored academy within our Trust in September 2011 with two intakes into reception and one intake for Year 1 and Year 2. Cost pressures existed from the opening due to lower than expected year 1 and 2 pupil numbers and a school building that had been modified internally by the LA intake but was handed over with significant condition and un-suitability issues regarding the roof, windows and entrance design. Ensuring the Willow Bank budget remained solvent both in terms of budget and cash flow was challenging in the first couple of years, but prudent and carefully thought out financial planning successfully maintained a balanced budget which has seen financial stability for Willow Bank improve year on year.

The Financial Director has prepared the financial plans drawing on her full understanding of academy funding and budget management which is enhanced by her many years of local authority service as the Bexley Schools Funding Manager.

- **Delivering value for money**

The Woodland Academy Trust has a proven record for delivering value for money for the schools within its family.

All decisions on procurement are considered carefully and best value sought through competitive tendering or quotations.

Economies of scale are achieved through purchasing services as a Trust and encouraging suppliers to offer greater discounts. This can be seen in the cost effective contracts across our Trust for cleaning, catering and

grounds maintenance among others. The cost effectiveness of having a contract across our Trust has resulted in savings in the region of [REDACTED] in the last three years.

We have an efficient ordering and recharging system to ensure each Trust school reflects the appropriate costs in their financial reporting.

Value for money is achieved by the collective sharing of expertise, best practice, proven initiatives and resources across all our schools as follows:

- Sharing expertise and best practice is achieved by the Trust CPD training.
- The Trust subscribes to a successful online free school meal application service and HR system. The Trust achieves excellent value in purchasing e.g. standardised school exercise books.

We aim to standardise contractual arrangements whenever appropriate.

- **Supporting the delivery of the education vision and plan**

The financial plans for Lime Wood Free School will be developed in conjunction with the education vision and plan by:

- Engaging the Senior Leadership team in the annual budget preparation and monitoring.
- Meeting the educational priorities for the coming year but balancing need with affordability.
- Involving Members and Directors in the financial planning and decisions.
- Ensuring that the education vision and plan includes clear timescales and costings for aims and developments.
- Ensuring that the Pupil Premium is targeted effectively at narrowing the attainment gap.

- **Benchmarking**

- The forecast expenditure budgets for Lime Wood have been determined by considering internal benchmarking data of average per pupil spend across the three primary schools within the Woodland Academy Trust accounts and the national benchmarking data available for primary schools on the DfE Consistent Financial Reporting website.
- The Woodland Academy Trust benchmarking data is drawn from the current 2015/16 budgets.

- **Contingency and unforeseen**

- The financial plans have been based on the assumption of a full pupil intake and prudent staffing and associated budgets.
- A budget for contingency has been set at 1% of total funding per annum.

- Appendix A demonstrates the impact of a lower projected pupil intake of 70% of the school published admission number on funding and the amendments to the budget in terms of staffing and expenditure that would be necessary to ensure the budget remains viable.
- Lime Wood Free School will have the option of deploying additional income generated from letting the unoccupied school building areas during Years 1-6 to further support unforeseen cost pressures if required.

2. Lime Wood Free School Budget Plan for 2017-18 to 2024-25

• Pupil role and characteristics assumptions

Lime Wood Free School will be a 3 form of entry primary school for children aged 4-11.

It will open with an anticipated reception intake of 90 and will increase by 3 forms of entry each year for the next 6 years.

Although Lime Wood will not have a nursery provision, it will establish links with a private provider from the outset to be the main feeder source into reception. This is a proven model of success that we have already established at Willow Bank Primary.

For the purpose of preparing the financial plan for Lime Wood, the Bexley averages for free school meal eligibility, Ever 6 eligibility, EAL, low prior attainment and IDACI has been used as a prudent approach to financial planning for a free school. However, it should be noted that we anticipate that the pupil cohort will be more in line with the characteristics of the pupil population within the other Woodland Academy Trust schools and will therefore exceed the Bexley averages. Our assumptions are based on the locality of the new school and the needs of the local community.

• Income assumptions

The General Annual Grant has been calculated using the EFA Pre 16 Ready Reckoner.

Basic entitlement is funded on the assumption of the pupil roll increasing by 3 forms of entry (90 children) each year until 2023-24 when the school will be at full capacity and steady state.

As explained above, the 2015/16 Bexley averages have been applied to the deprivation factor both for FSM and IDACI. The Bexley average for FSM is 14.32%. In comparison the percentage FSM for the Woodland Academy Trust primary schools included in the 2015/16 GAG is as follows:

- Northumberland Heath Primary: 29%
- Peareswood Primary : 42%
- Willow Bank Primary: 36%

Lime Wood Free School is expected to attract pupils with similar levels of deprivation and need and therefore GAG funding is likely to exceed the prudent levels included in this application.

On the above basis, we also expect Pupil Premium Ever 6 to be at a higher level of eligibility than the Bexley average of 23.04% and be nearer 40%. NNDR funding has been calculated to match fund the estimated NNDR expenditure.

No other funding has been used in the budget forecast at this stage although it is fully expected that the school will generate the following income streams once open:

- High Needs Top Up – to support any Education Health Care Plans that are agreed
- Universal Free School Meals Grant and school meal income – assumed cost neutral in the financial forecast
- Lettings – the new school building and facilities will provide a wealth of opportunity for allowing external groups and the local community to access the site for a range of purposes, some of which will generate lettings income. We intend to invite an early years provider to occupy some of the spare educational space in the first six years to build a partnership in EYFS provision, a model we have embedded at all of our schools within the Woodland Academy Trust.
- Traded Services – we are experienced in supporting other settings and organisations by sharing our expertise and generating external income for the Trust. We currently have a National Leader of Education and two Specialist Leaders of Education and will imminently have further members of our Senior Leadership Team formally recognised as specialist providers.
- External grants – the Woodland Academy Trust has a proven track record in successfully bidding for external funds. In 2014/15 we were fortunate to be awarded [REDACTED] from the Excellence Fund to support a Literacy for Life project across all three schools.
- Investment income – we actively seek the best returns on our reserves through non risk investment accounts with our nominated bank provider.

- **Staffing assumptions**

Senior Leadership: Lime Wood will initially open with a full time Head Teacher who will also act as the inclusion leader for the first two years. An Assistant Head Teacher will be appointed in Year 3 who will take on the inclusion role. In Year 4 a second AHT will be appointed. A Deputy Head Teacher will be recruited for Year 5 to complete the Senior Leadership team.

Teachers: Three class teachers will be recruited annually. In the first two years we will aim to recruit qualified teachers (these have been costed at an average grade of MPS3) in order to establish a sound basis of experience in the new school. From Year 3 we will aim to recruit NQTs .

Teaching and Learning responsibility points will be introduced in Year 2, 4 and 6 for key stage leadership EYFS, KS1 and KS2.

Pupil Support: An NNEB (Nursery Nurse) per Reception class will be recruited in Year 1. From Year 2, teaching assistants will be appointed as follows:

- Year 2 – 30 hours per class
- Year 3 – 30 hours per class
- Years 4-6 - 20 hours per class

Teaching assistant time will be deployed to best support the children's needs and deliver focussed interventions and will not necessarily be assigned to a particular class.

Learning Mentors and Cover Supervisors will be appointed in Years 2, 4 and 6. The Trust successfully deploys learning mentors to support their most vulnerable and high-need children.

Cover Supervisors provide value for money in reducing the need for external supply and in providing familiarity for children.

A part-time IT Technician will be recruited from the outset.

Administration and Premises: The front office will be covered initially by a school secretary, to be joined by an Administrative Assistant in Year 2 and a part-time Receptionist in Year 4. A Premises Manager will be appointed from the outset.

The staff at Lime Wood will benefit from the full support of the Senior Leadership Team of the Woodland Academy Trust who will work closely with Lime Wood to provide continuing professional development.

Other staff:

Midday Supervisors will be appointed for lunch cover at the rate of three per year for Years 1-4. From Year 5 one 10 hour MDS will be appointed to cover the split lunch plus one 6.25 hour MDS.

A Senior Midday Supervisor will be recruited from Year 2.

- **Expenditure assumptions**

- 1) Other Staff Costs

Supply Budget: The budget for short term supply cover for sickness and release has been set using the average primary spend of ■■■ per pupil. In addition provision has been made for 1.5 days PPA release per week per year group and NQT release from Year 2.

Employee expenses: Budget is based on primary average of ■■■ per pupil.

Development and training: Based on the Woodland Academy Trust average budget [REDACTED] per pupil.

Recruitment: Trust average costs are [REDACTED] to include annual subscription to the Times Education Supplement of [REDACTED] and Bexley recruitment costs of [REDACTED]. Lime Wood budget increased by 100% to provide for above average costs. Budget also includes provision for agency finder fees of [REDACTED] for Years 1-3, increasing to [REDACTED] from Year 4.

- **Premises:**

Building maintenance and improvement: The budget has been profiled on the Woodland Academy Trust maintenance contracts and the average per pupil spend of [REDACTED] for jobbing repairs and [REDACTED] for planned maintenance. Year 5 includes the cost of the 5 year electrical test. PAT testing has been budgeted for bi-annually. Maintenance contracts include heating, security and fire alarms, air conditioning, shutters, PE and gym equipment, water testing, fire extinguishers, washrooms, pest control, gas safety checks, workplace fire assessments and canteen tables/chairs inspection.

Grounds maintenance and improvement: Budget is based on the average grounds maintenance annual contract costs for the Woodland Academy Trust schools of [REDACTED] per annum. An additional [REDACTED] has been included to allow for estimated developers service charges related to the shared community areas on the site.

Cleaning and caretaking: Best value can be achieved by having a Trust contract for cleaning. Budget allows for increase in cleaning areas as school roll grows. Annual deep clean of kitchen areas and cooking vents has been included.

Water and sewerage: Budget is calculated on average primary spend of [REDACTED] per pupil.

Energy: Budget is calculated on average primary spend of [REDACTED] per pupil.

Rates: Budget is based on Northumberland Heath rates as a 3 FE primary. The budget equals the EFA match funding.

- **Educational Resources:**

Learning resources (not ICT): Based on the Trust average of [REDACTED]. This compares to the DfE benchmarking average of a London school with medium FSM of [REDACTED] per pupil. Budget includes all curriculum books, resources, printing, licences, subscriptions, trips and furniture and equipment. A swimming budget of [REDACTED] has been added from 2020/21.

ICT learning resources: Based on the Trust average of [REDACTED] per pupil (DfE benchmarking is [REDACTED] per pupil).

Administrative supplies: Based on the Trust average of [REDACTED] per pupil (DfE benchmarking is [REDACTED] per pupil).

Start up budget for furniture and equipment: [REDACTED] budget in Year 1 to cover cost of equipping EYFS play areas (internal and external) including storage. Year 2 and 3 budget set at [REDACTED] per class. From Year 4 the learning resources budget will absorb the cost.

ICT budget for new classes: [REDACTED] budget for new classrooms ICT needs including laptops, printers and whiteboards. ICT budget will cover cost from Year 4.

- **Professional Services**

Legal: [REDACTED] per annum to cover all legal costs and access to Quick Call support service.

Auditing: [REDACTED] per annum for external accountancy fees and audit of accounts, pensions and financial probity and controls including responsible officer audits.

Marketing: [REDACTED] budget for promotional and publicity activities in Years 1 and 2 decreasing to [REDACTED] per annum from 2019-20.

Curriculum professional services: Based on DfE Benchmarking average of [REDACTED] per pupil. The budget will include the cost of all bought in curriculum services such as after school tuition, summer schools, educational psychology and welfare support, curriculum theme days, access to the Trust Executive Head Teacher for School Improvement and external music services.

- **Other**

Insurance RPA: EFA pooled arrangement.

Contingency: 1% of total funding.

Catering: Assumed cost neutral in Years 1-3 as meals will be funded from Universal Free School Meals grant. From Year 4 annual cost calculated at pupil roll KS2 * average FSM 14.32 % * 195 school days * [REDACTED] per meal

Woodland Academy Trust Services:

HR services: Access to the HR team.

Strategic Leadership Services: Access to the Executive Principal of the Woodland Academy Trust*.

Finance services: Access to the Finance Director.

Premises management services: Access to the Business Director.

Extended services: Access to the Extended Services Manager.

These services will be financed via a top slice recharge in line with the Woodland Academy Trust policy and has been costed as follows:

- Years 1-2: 4% of the total GAF income for the new school.
- Year 3 onwards: 3% of the total GAF income – based on the assumption that the school has been inspected and is outstanding.
- The top slice has been pro-rated proportionally across the various services in line with the current Woodland Academy Trust staffing profile.
- The bought in professional services (curriculum) budget includes the cost of support from the Trust Executive Head Teacher for School Improvement.

Payroll services: Outsourced costs based on Trust current costs of [REDACTED] per payslip and P60.

Depreciation: Provision has been made for the replacement of IT equipment from Year 4.

Section G2

The financial template demonstrates that Lime Wood Free School will be viable within the expected levels of funding available both while it builds up and when it is at full capacity.

The annual budgets are balanced in year with surplus' ranging from 7% to 12%.

In year underspends in excess of 8% will be considered for school improvement initiatives in the following year in line with the Woodland Academy Trust reserves policy or used to support capital projects.

G3 Financial resilience to reductions in income

You should include an overview explanation of how you approached making 30% savings and your rationale for suggesting the changes that you have. You must show how you made 30% savings for each year up to and including the year your school reaches steady state. As part of this, you should explain how your amended plans would continue to support delivery of your education vision and plan.

Please add additional lines as required. The boxes will expand as you enter text.

In the table below you should explain in detail the actions you would take to reduce costs, the reasons for these and the approximate savings that would result.

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|---|-----------------------------|---|
| | | [e.g. 2017 to 2019) | [e.g. £k (2017) £k (2018) £k (2019)] |
| Staffing:Teaching | Classes will be reorganised in line with the actual pupils on roll. A 30% reduction would be 63 pupils per year needing two teachers. | 2017-2024 | <div></div> <div></div> <div></div> <div></div> <div></div> |

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|---|------------------------------|---|
| | | | <div></div> <div></div> <div></div> |
| Staffing: Leadership | <p>The appointment of the second AHT would be deferred by one year to 2021.</p> <p>The appointment of a DHT would be deferred until the pupil roll increased or the budget can sustain the year on year cost.</p> | <p>2020</p> <p>2021-2024</p> | <div></div> <div></div> <div></div> <div></div> <div></div> |
| Staffing: Support staff | Reorganisation of classes will result in a saving of a TA per annum in KS2. | 2021-2024 | <div></div> <div></div> <div></div> <div></div> |

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|---|-----------------------------|--|
| Staffing: support | The appointment of a 3 rd learning mentor and cover supervisor will be deferred until the pupil roll increased or the budget can sustain the year on year cost. | 2021-2024 | ██████████ ██████████ ██████████ ██████████ |
| Staffing: Other | Reorganisation of classes will result in a saving of an MDS per annum in KS2. The appointment of a receptionist will be deferred until the pupil roll increased or the budget can sustain the year on year cost. | 2021-24 2020-24 | ██████████ ██████████ ██████████ ██████████ ██████████ |
| Supply | The reduction in staff levels will lead to a corresponding reduction in supply needs | 2017-2024 | ██████████ ██████████ ██████████ |

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|---|-----------------------------|---|
| | | | <div></div> <div></div> <div></div> <div></div> <div></div> |
| Educational resources | The furniture/equipment and ICT budgets for the new classes can be reduced by 30% | 2017-2019 | <div></div> <div></div> <div></div> |
| Professional Services | The bought in professional services budget is calculated on a per pupil basis and can be reduced by 30% | 2017-2024 | <div></div> <div></div> <div></div> |

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|--|-----------------------------|---|
| | | | <div></div> <div></div> <div></div> <div></div> <div></div> |
| Other | Trust service contributions are calculated as % of funding and will therefore reduce by a corresponding 30%. | 2017-2024 | <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> |

| Budget Line (area of expenditure) | Description of how expenditure would be modified/plans adapted – top [10] changes | Year(s) savings would apply | Savings in each year against original budget (£k) |
|-----------------------------------|--|-----------------------------|--|
| | | | ██████████ |
| Educational resources * | The curriculum resource budget is calculated on an average per pupil basis and will be reduced by 30%. | 2017-2024 | ██████████ ██████████ ██████████ ██████████ ██████████ ██████████ ██████████ ██████████ |
| TOTAL | | | ██████████ |

The above expenditure reductions would not impact on the vision and aims for Lime Wood Primary School. Sufficient budgets are retained to ensure pupils make excellent progress and receive a first class education.

Budgets will be enhanced by additional income generated from letting out the unoccupied learning spaces in the first six years and making full use of the extended school facilities available to the community.

Lime Wood will benefit from the full support of the Woodland Academy Trust in achieving best value in all areas of expenditure and maximising economies of scale by accessing Trust wide contracts and services.

Impact on funding

The sensitivity test applies a 30% reduction in pupil intake as a 30% reduction to all funding. However, in reality, only certain elements of GAG funding are calculated on pupil numbers.

The following funding will be paid in full regardless of the actual pupil roll:

Core funding [REDACTED]

NNDR [REDACTED]

Leadership grant

Reinstating 30% of the above funding to the sensitivity target will generate the following additional income to be added to the expenditure savings above:

| | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 |
|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | | |
| [REDACTED] | | | | | | | | |

(Appendix A) Pupil projections based on 70% uptake of the school published admission number.

| | 2017/ 18 | 2018/ 19 | 2019/ 20 | 2020/ 21 | 2021/ 22 | 2022/ 23 | 2023/ 24 | 2024/ 25 |
|----------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| PAN | 90 | 180 | 270 | 360 | 450 | 540 | 630 | 630 |
| 70% PAN | 63 | 126 | 189 | 252 | 315 | 378 | 441 | 441 |

Using this model there would be two classes per year group with a respective pupil roll of 31 and 32. To meet pupil/adult ratios in foundation/KS1 there would need to be an additional 25 hour TA assigned to each class.

The revised FTE teaching and support staffing will be as follows:

| | 2017/ 18 | 2018/ 19 | 2019/ 20 | 2020/ 21 | 2021/ 22 | 2022/ 23 | 2023/ 24 | 2024/ 25 |
|-------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Teachers | 2 | 4 | 6 | 8 | 10 | 12 | 14 | 14 |
| Deputy Head Teacher | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Assistant Head Teacher | 0 | 0 | 1 | 1 | 2 | 2 | 2 | 2 |
| NNEBs | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Teaching assistants | 2 * .7 | 6 * .7 | 10* .7 | 10* .7 2 * .5 | 10* .7 4* .5 | 10* .7 6* .5 | 10* .7 8* .5 | 10* .7 10* .5 |
| Midday Supervisors | 2 | 4 | 6 | 8 | 10 | 12 | 14 | 14 |
| Learning Mentors | 0 | 1 | 1 | 1 | 1 | 2 | 2 | 2 |
| Cover supervisors | 0 | 1 | 1 | 1 | 1 | 2 | 2 | 2 |

The financial saving generated from the above model will be as follows:

| | 2017/ 18 | 2018/ 19 | 2019/ 20 | 2020/ 21 | 2021/ 22 | 2022/ 23 | 2023/ 24 | 2024/ 25 |
|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| ██████████ | ████ | ████ | ██████ | ██████ | ██████ | ██████ | ██████ | ██████ |
| ██████████████████ | | | | | ████ | ████ | ████ | ████ |
| ██████████████████ | | | | ████ | | | | |
| ██████████████████ | | | | ████ | ████ | ████ | ████ | ████ |
| ██████████████████ | | | | ████ | ████ | ████ | ████ | ████ |
| ██████████████████ | | | | ████ | ████ | ████ | ████ | ████ |
| ██████████████████ | | | | ████ | ████ | ████ | ████ | ████ |

Section H: Premises

Please refer to the relevant section of the 'How to apply' guidance and the assessment criteria booklet for what should be included in this section.

This section will need to be completed by both route 1 and 2 applicants.

Please complete the excel application form.

Annexes

In this section you should provide CVs of key individuals, any letters of support and maps. The annex is excluded from the page limit but should be submitted as part of your application, i.e. as one word document.

This section will need to be completed by both route 1 and 2 applicants.