



Department
for Education

Free school application form

Mainstream, studio, and
16 to 19 schools

Published: December 2015

Insert the name of your free school(s) below using BLOCK CAPITALS

Bury St. Edmunds All-Through School: Middle Phase

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The application form explained

Before completing your application, please ensure that you have read both the relevant [background information and glossary document and the assessment criteria booklet](#) carefully. Please also ensure that you can provide all the information and documentation required.

Sections

Declaration

The declaration must be made by a company member on behalf of the company/trust. The declaration section is found in the Word application form. All applicants are required to complete this section in full.

All applicants will need to complete sections A, B, C, E, H and I in full.

For sections D, F and G, the information you need to provide will depend on the type of group you are. Please refer to the relevant section of the *background information and glossary document* and the *assessment criteria booklet*, for the information your group should include in these sections.

Section A asks you for applicant details in the Excel form.

Section B asks you to outline your proposed free school(s) in the Excel form.

Section C asks you for detailed information on the vision for your school(s) and is to be completed using the Word form.

Section D asks you for detailed information on your proposed education plan(s) and is to be completed using the Word form.

Section E asks you to evidence that there is a need for the school(s) you are proposing in the Word form.

Section F asks you to demonstrate that you have the capacity and capability to open the school(s) you are proposing and is to be completed using the Word form.

Section G specifically asks about costs. This requires the completion of the relevant sections of the Excel budget template.

Studio schools use a different Excel budget template than mainstream and 16-19 free schools.

Section H asks for information about premises, and 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 Word form for this.

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

Submitting Sections A to H

The completed Word and Excel templates and the budget plans need to be submitted by email to the department by the application deadline to: FS.applications@education.gsi.gov.uk. Your email must be no larger than 9MB in size.

Applications for a Studio School should also be sent to: applications@studioschooltrust.org.

The Word template should be between 50 and 100 pages long (depending on which type of group you are); 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. You may also hand deliver if you prefer.

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

Submitting Section I

Section I, ie the Personal Information form, is required for each member, director, and principal designate who 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 by email alongside a copy of Section A (from the Excel template) to due.diligence@education.gsi.gov.uk stating the name of the school in the subject title.

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

Task to complete	Yes	No
1. Have you established a company by limited guarantee?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Have you provided information on all of the following areas (where applicable)?		
Section A: Applicant details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Section B: Outline of the school	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Section C: Education vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Section D: Education plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Section E: Evidence of need	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Section F: Capacity and capability	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section G: Budget planning and affordability	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section H: Premises	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Is the information in A4 format, using Arial 12 point font, and includes page numbers?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Have you fully completed the appropriate budget plan(s) where necessary?	N/A	
5. Have you included CVs in the appendices for all relevant individuals in the template provided and in line with the requirements set out in the criteria?	N/A	
6. Independent schools only* : Have you provided a copy of the last two years' audited financial statements or equivalent?	N/A	

7. Independent schools only* : Have you provided a link to your school's most recent inspection report and completed an externally validated self-assessment and governance assessment?	N/A	
8. Independent schools only* : Have you provided the documents set out in the criteria document specifically around your current site?	N/A	
9. Re-applications only : Have you changed you application in response to the written feedback you received, if you are re-applying after being unsuccessful in a previous wave, as set out in Section 4.4 of this guide?	N/A	
10. Have you sent an email (of no more than 9 MB in size**), titled: Free School Application - School Name: [insert] with all relevant information relating to Sections A to H of your application to: FS.applications@education.gsi.gov.uk before the advertised deadline?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11. Studio schools only : Have you emailed a copy of your application to the Studio Schools Trust at: applications@studioschooltrust.org ?	N/A	
12. Have you sent two hard copies of the application by a guaranteed delivery method such as 'Recorded Signed for' to the address below? Free Schools Applications Team, Department for Education, 3 rd Floor Sanctuary Buildings, Great Smith Street, London, SW1P 3BT	<input checked="" type="checkbox"/>	<input type="checkbox"/>

* 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	Yes	No
12. Have you sent: <ul style="list-style-type: none"> a copy of Section A (tab 1 of the Excel template); and copies of the Section I Personal Information form for each member, director, and principal designate who has not submitted one of these forms within the past 365 days; and a list of those lead applicants, members, directors, and principals designate who have submitted Section I forms within the past 365 days by emailing scanned copies of Section I forms to due.diligence@education.gsi.gov.uk stating the name of the school in the subject title, including a full list of members, trustees, and the principal designate (if appointed); and a copy of Section A? (See guidance for dates and deadlines)	<input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

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 background information and glossary document;
- 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.

Signed: 

Position:  (please delete as appropriate)

Print name: 

Date: 25/1/2016

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:

Completing the application form

Section A – applicant details (use Excel spread sheet)

This section will need to be completed by **all** applicants. Please:

- complete the Section A tab in the Excel spread sheet; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

Section B – outline of the school (use Excel spread sheet)

This section will need to be completed by **all** applicants. Please:

- complete the Section B tab in the Excel spread sheet; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

Section C – vision

This section will need to be completed by **all** applicants.

Please:

- use the space provided below; and
- provide one version of this section, referring to individual schools or circumstances if you are applying for more than one school;
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

Section C1 – a credible proposal to deliver a high-quality free school and a clear rationale for establishing it in this area

The Bury St Edmunds Academy Trust operates as an all-through school in three phases. It takes children from aged 4-18 and has one Trust Board for governance, one budget, common policies, a single website and a curriculum and assessment system across the age range. Headteachers meet weekly, deputies meet monthly, cross-phase curriculum teams and the assessment working group meet at least half termly, curriculum route planners are followed by all and there is a data window in each half term for assessments against agreed objectives to be entered, monitored and reported. There is an all-through sports partnership, specially appointed Trust music and dance specialists and other cross-phase appointments, teaching and non-teaching.

The three phases within this all-through structure are 4-9; 9-13 and 13-18. These are chosen to best fit the personal development of children and we believe it is no coincidence that it is the structure which is favoured by the country's top independent schools. It means that in years 5 and 6 pupils have access to specialist teaching and facilities. This is an oft-quoted reason for the success of prep schools and is, for example, one recommendation of the Shanghai Mathematics Project. It has also been shown that by the end of year eight, pupils in a middle school system pupils are ahead of where their counterparts are in a high school. This echoes recent concerns made about standards in the early years of high schools (eg HMCI of Schools annual report for 2014-15.) It is confirmed, for example, in the most recent Ofsted report for the Trust's Westley Middle:

Pupils' attainment at the end of Year 8 was above expectations for their age in 2012 and is on track to be so again in 2013. (June 2013)

At 13, pupils and parents are in a position to make a sensible choice about the best type of upper school provision in a way which is not possible at 11. This is particularly true when they have been known to staff for at least four years prior to making a decision and where the different types of provision are within one Trust so a move is possible after a foundation year or for sixth form. This was a powerful argument in favour of our Technical Academy application (See below).

Thus the Trust believes that operating in these three phase offers the best

Section C1 – a credible proposal to deliver a high-quality free school and a clear rationale for establishing it in this area

opportunities at all ages. That they are contained within one all-through school, reduces the number of transitions children make to the minimum, thus making this system better than the traditional two-tier model and counteracting arguments sometimes made against a three-tier system.

The Trust currently operates across six sites. Two offer first phase provision, three offer provision in the middle phase and one operates in the upper phase. The Trust made a successful Free School application in the May 2015 round. This enables it to open a distinctive Technical Academy in September 2017. Currently the Trust has 330 places per year group in its middle phase. This is the number of places required from September 2017 to fill its current upper school and its Technical Academy under the proposals submitted.

The Trust's vision is to maintain these places, to make better use of its sites, to create fewer campuses each educating more of our all-through age range and to provide better value for money, both for the capital element of the Technical Academy project and the long term revenue costs of the whole Trust. Our vision, as set out in our May 2015 application (Section H,) is as follows:

- [Redacted]
- [Redacted]

This vision provides provision for ages 9-18 on two of the Trust's sites, enabling more all-through activity, a greater sharing of staff, facilities and resources and better value for money. It reduces the number of sites as a whole whilst still leaving room on the Trust's current 9-13 Horringer Court site to expand our 4-9 provision in line with predicted growth and parental choice.

The new Free School is needed because one of the three existing middles (Howard Middle) currently working in our Trust was not allowed by the Local Authority officially to join the Trust as an academy when the other applications were made in 2010. The LA made the Trust withdraw its application in the spring of 2011 as a condition of its support for the creation of the Trust and the conversion of the other schools to academy status. The LA is closing Howard middle in the summer of 2016 to use the site for a primary school. This Free School application does not require the site of the existing Howard middle school and therefore has no impact on the LA's plans for it.

Section C1 – a credible proposal to deliver a high-quality free school and a clear rationale for establishing it in this area

However, the closure of Howard middle school removes 100 places per year group from the middle phase of our Trust. Replacing these places is crucial. Firstly, County Upper School has always served the Howard community. It is the most deprived ward in the town and its residents greatly appreciate the link with County Upper. Their children have done extremely well there and the community continues to fight to save it (See section E). Secondly, without these places, the Trust will only have 220 places in its middle phase. This is nothing like enough to fill County Upper and the Technical Academy. Despite the latter having been extremely well received, it would be irresponsible of the Trust to proceed with it, knowing that there are insufficient pupils able to access it.

In summary, we believe that every child deserves a first class education which develops their interests, talents and aspirations. This is essential so that pupils can access opportunities for a lifetime. Without such opportunity we diminish both individuals and also their communities. Education is central to creating prosperous and successful communities. There is much evidence to demonstrate the absolute link between quality of educational provision and the overall quality of community life.

The Bury St Edmunds All-Through Academy Trust has a strong track record in delivering high standards and was one of only eight institutions to be inaugural recipients of The World Class Schools Quality Mark which recognised us as ‘a truly collaborative organisation which is uniquely effective in improving the life choices of young people.’ It is led by Bury St Edmunds County Upper School which has had eight consecutive ‘Outstanding’ judgements from Ofsted (two surveys, a science and five full inspections, the most recent in September 2013). Described by [REDACTED] on a visit in March 2015 as, ‘a beacon of hope in a county which still has difficulties; radiating excellence across Suffolk and beyond’, the Trust believes that we have a moral purpose to share our success, improve educational standards locally and provide a distinctive technical academy which could be a blueprint of national importance. Maintaining our existing 330 places per year group across the Trust’s middle phase is essential to delivering our vision for all who currently embrace it and to enable our plans for our Technical Academy to proceed. This can only be achieved by approval of this Free School application for 400 middle phase places using existing County Upper accommodation. That is why they were included in our May 2015 Free School application, albeit not as a separate application.

Section D – education plan: part 1

This section will need to be completed by **all** applicants. Please:

- use the table below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

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.

THE PROPOSAL IS TO OPEN IN SEPTEMBER 2016 IN TEMPORARY ACCOMMODATION WHEN EXISTING PROVISION ON THE HOWARD/MILDENHALL ROAD ESTATE IS CLOSED (SEE SECTION C.)THE NUMBERS SHOWN IN THE ‘Current number of pupils’ SECTION BELOW IS THOSE IN THE CLOSING SCHOOL CURRENTLY WHO WOULD TRANSFER. IT IS KNOWN THAT THERE ARE ENOUGH PUPILS CURRENTLY BEING TURNED AWAY FROM THE TRUST’S OTHER MIDDLE PHASE PROVISION TO FILL THE ADDITIONAL SPACES. THE NUMBER OF YEAR 4 PUPILS TO FILL A YEAR 5 WILL BE KNOWN IN APRIL 2016 BUT INDICATIONS ARE THAT IT WOULD BE FULL.

	Current number of pupils (if applicable)	2017	2018	2019	2020	2021	2022	2023
Reception								
Year 1								
Year 2								
Year 3								
Year 4								
Year 5	KNOWN IN MID-APRIL	100	100	100	100	100	100	100

Year 6	90	100	100	100	100	100	100	100
Year 7	90	100	100	100	100	100	100	100
Year 8	N/A	100	100	100	100	100	100	100
Year 9								
Year 10								
Year 11								
Year 12								
Year 13								
Totals	current: 180 Sept. 2016: 300	400	400	400	400	400	400	400

Section D – education plan: part 2

D1 – an ambitious and deliverable curriculum plan which is consistent with the vision and pupil intake

If you are applying for more than one school and they will all be similar, please provide one version of this section, referring to individual schools or circumstances, where relevant. If schools will be different, you may find it simpler to provide more than one version of this section.

All applicants will need to complete the table of subjects and hours. Please use the table below.

Subject/other activity	Hours per week	Mandatory/ Voluntary	Comments

--	--	--	--

[Add more lines as appropriate]

All applicants will need to complete this section, but you will give us different information depending on which type of group you are. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

D1 - an ambitious and deliverable curriculum plan which is consistent with the vision and pupil intake

[Add text here. Table expands]

D2 – measuring pupil performance effectively and setting challenging targets

If you are applying for more than one school, please provide one version of this section, referring to individual schools or circumstances where relevant.

All applicants will need to complete this section, but you will give us different information depending on which type of group you are. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

D2 – measuring pupil performance effectively and setting challenging targets

[Add text here. Table expands]

D3 – a staffing structure that will deliver the planned curriculum within the expected income levels

If you are applying for more than one school, please provide one version of this section, referring to individual schools or circumstances where relevant.

All applicants will need to complete this section, but you will give us different information depending on which type of group you are. Please:

- use space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

D3 – a staffing structure that will deliver the planned curriculum within the expected income levels
[Add text here. Table expands]

D4 – the school will be welcoming to pupils of all faiths/world views and none

All applicants will need to complete this section in full for each school they wish to open. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

D4 – the school will be welcoming to pupils of all faiths/world views and none
<ul style="list-style-type: none">• The admissions policy for the Trust makes it clear that places are available for pupils of all faiths and none; for pupils of all abilities and that support is available for SEND pupils.• The lead school in the Trust has been graded 'outstanding' for SMSC by Ofsted in all its inspections;• The following are from the last inspection reports of the Trust's middle phase provision: <p>The school promotes pupils' spiritual, moral, social and cultural development well. Visitors reinforce the school's regular links with local churches. Lessons on beliefs and values help pupils develop their sense of right and wrong. Charity weeks raise significant sums for local causes. Links are growing with schools in Rwanda and the Philippines. (Horringer Court)</p>

D4 – the school will be welcoming to pupils of all faiths/world views and none

Pupils' spiritual, moral, social and cultural development is strong, reinforced by assemblies which encourage pupils to show resilience and to persevere through potential challenges. An extensive range of after-school clubs and visits overseas give pupils the opportunity to learn new skills and broaden their horizons. Strong leadership of behaviour helps pupils to be very clear about moral boundaries. (Howard)

The school promotes pupils' spiritual, moral, social and cultural development particularly well. Pupils relish taking on a range of responsibilities which involve them looking after their peers. For example, the role of peer mentor is highly sought after and considered prestigious. One peer mentor said, 'Our job is to make sure there is always someone there to help. It is a very important one.' (Westley)

- As with all areas of the curriculum, there is an all-through PHSE curriculum with an agreed scheme of work from 4-18. A cross-phase team meets half termly to implement this scheme of work and associated assessment;
- The notes below explain the way PHSE/SMSC/ British values are covered between years 5 and 8. This would be replicated in the new provision:

In the middle phase, Personal, Social, Health and Enterprise Education (PSHEe) and Citizenship is a carefully planned, sequential and progressive programme based around six whole-school modules covering what we consider will give pupils the best opportunities to cope at a personal level for the pressures of an increasingly complex, competitive and stressful world, and provides a vital foundation for preparing them for their lives ahead. We want our students to lead confident, healthy and responsible lives as individuals and members of society. The areas covered are:

- Goal-Setting
- Drugs, Alcohol and Tobacco
- Emotional Health and Wellbeing
- Personal Finance and Enterprise
- Sex and Relationships Education
- Economic Wellbeing
- Citizenship

The programme is delivered within lessons. However, there are other opportunities when PSHEe/Citizenship is delivered:

- Assemblies – due to the whole-trust approach to modules, this subject lends itself to assemblies based around the current module. However, many other relevant topics, especially those relating to the trust's values and current events or issues, are also covered in assemblies.
- Personal Tutors – all pupils have Personal Tutors who meet with them regularly to discuss progress, target-setting and are a point of contact for any issues they may have. All Form Tutors are responsible for year 5, 6 and 7 pupils in their forms. All other staff members are responsible for some Year 8 pupils. In this way all staff are Personal Tutors.
- Vertical Tutoring – all forms consist of pupils from all year levels (5,6,7 and 8). In

D4 – the school will be welcoming to pupils of all faiths/world views and none

this way older pupils become mentors for younger pupils, with year 8 pupils being responsible for named year 5 pupils, especially at the start of their time at the middle phase.

As well as tutor times, forms also have opportunities to work together to discuss and elect student councillors, on writing days run throughout the year, the annual enterprise activities leading up to the Trust Fairs run entirely by students and 'one-off' activities such as the 'Growth Mindset' course for pupils helping pupils to understand how the brain can be trained.

- Student Council – our democratically elected council meets regularly to discuss issues and suggestions from the student body. In this way all pupils have a 'voice', and many changes have been brought about by some of these suggestions. Councillors are also used on public occasions to represent the student body. The election process reflects the British parliamentary system.
- Charity Fund-Raising – this is a whole-trust, high-profile focus every year where the community elects the charities for which everyone will raise money. The Trust is extremely proud of the considerable amounts of money it has raised over many years for local, national and global charities.
- Community Links – a significant number of pupils go out into the community to help younger pupils, particularly in Art and sport. Pupils also take part in the Sports Leaders Programme.

Spiritual, Moral, Social and Cultural Development

Spiritual, Moral, Social and Cultural Development (SMSC) is promoted across the entire curriculum and all aspects of Trust life. We work hard to ensure that all students have the opportunity to develop an understanding of right and wrong; an appreciation of the Arts in all their forms and practise the skills and attitudes required for them to participate fully in a democratic society.

Spiritual development enables pupils':

- ability to be reflective about their own beliefs, religious or otherwise, that inform their perspective on life and their interest in and respect for different people's faiths, feelings and values
- sense of enjoyment and fascination in learning about themselves, others and the world around them
- use of imagination and creativity in their learning
- willingness to reflect on their experiences.

Moral development enables pupils':

- ability to recognise the difference between right and wrong, readily apply this understanding in their own lives and, in so doing, respect the civil and criminal law of England
- understanding of the consequences of their behaviour and actions
- interest in investigating and offering reasoned views about moral and ethical issues, and being able to understand and appreciate the viewpoints of others on these issues.

D4 – the school will be welcoming to pupils of all faiths/world views and none

Social development enables pupils’:

- use of a range of social skills in different contexts, including working and socialising with pupils from different religious, ethnic and socio-economic backgrounds.
- willingness to participate in a variety of communities and social settings, including by volunteering, cooperating well with others and being able to resolve conflicts effectively
- acceptance and engagement with the fundamental British values of democracy, the rule of law, individual liberty and mutual respect and tolerance of those with different faiths and beliefs; the pupils develop and demonstrate skills and attitudes that will allow them to participate fully in and contribute positively to life in modern Britain.

Cultural development enables pupils’:

- understanding and appreciation of the wide range of cultural influences that have shaped their own heritage and that of others
- understanding and appreciation of the range of different cultures within school and further afield as an essential element of their preparation for life in modern Britain
- knowledge of Britain's democratic parliamentary system and its central role in shaping our history and values, and in continuing to develop Britain
- willingness to participate in and respond positively to artistic, sporting and cultural opportunities
- interest in exploring, improving understanding of and showing respect for different faiths and cultural diversity, and the extent to which they understand, accept, respect and celebrate diversity, as shown by their tolerance and attitudes towards different religious, ethnic and socio-economic groups in the local, national and global communities
- understanding and appreciation of the wide range of cultural influences that have shaped their own heritage and that of others

Assemblies

In the middle phase, assemblies are used as an opportunity to give pupils a wider understanding of Spiritual, Moral, Social and Cultural development. Many assemblies are centred around a rota based on the School Values (see below), all of which are also British Values. Through these Values, pupils learn to respect the views of others, wonder at our world (near and far), accept the differences and similarities of others and learn the individual values of honesty and perseverance. Other assemblies often focus on Social development and the acceptance of different cultures and religious celebrations, and the parliamentary system is covered in assemblies alongside pupils following the democratic system of electing our School Councillors. Also, as the whole school focuses on the same theme each half term in PSHE, these modules are also often used as a basis for assemblies.

At the end of most assemblies, pupils are asked to reflect personally on the topic or theme.

Trust Values

D4 – the school will be welcoming to pupils of all faiths/world views and none

These are displayed in all classrooms, on year boards and at the front of the school. These are used as a focus for assemblies and are often referred to by adults when dealing with pupils. The values are:

- Honesty
- Respect
- Responsibility for one's actions
- Co-operation
- Perseverance
- Consideration
- Self-Discipline
- Tolerance

PREVENT STRATEGY

Staff across the Trust are fully trained in this area and all pupils have age-appropriate guidance on safe use of the internet. E-safety is taken very seriously and relevant filters are applied to all networks and devices accessed by pupils.

Section E – evidence of need

This section asks you to evidence that there is a need for the school(s) you are proposing. **All** applicants will need to complete both sections in full for each school they wish to open.

E1 – provide valid evidence that there is a need for this school in the areas

This section will need to be completed by **all** applicants. Please:

- use the space provided below;
- include evidence as annexes; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

E1 – provide valid evidence that there is a need for this school in the area

The Bury St Edmunds All-Through Trust currently has two middle phase academies within its MAT, both of which are full and turn parents away on a weekly basis. The Trust works in partnership with Howard middle school which will close in July 2016. Howard middle school has been served by County Upper school since the estate was established in the 1960s and 95+% of pupils at Howard middle transfer to County Upper. Parents have overwhelmingly and consistently rejected the LA proposals to close the school and wrote to the Prime Minister on the 8th May urging him to save their school. They continue to try and follow the legal advice given to have the closure decision overturned. The vast majority of parents continuously petition the Trust to take their children into an expanded middle phase when Howard shuts. Morally, the Trust has a duty to these families whose children have done exceedingly well at County Upper for more than 50 years. In practice, there is no choice but to take them. This requires the Trust to find an additional 90 places in its middle phase once Howard shuts. However, the Trust also has a responsibility to the areas served by its two middle phase academies. Oversubscription at these two academies guarantees that provision for an additional 100 places in the middle phase will be full.

For September 2016 the Trust is having to provide the extra places through the use of temporary classrooms and planning for this is underway. Without being allowed to open this additional Free School, a bid will need to be made to the CIF fund on the grounds of a rapid rise in numbers and that bid is being prepared. However, from 2017, if this Free School is granted, it can move into accommodation freed up by the Trust making best use of its sites as it opens its new Technical Academy for 13-18 year olds. This solution to the lack of middle phase places also gives considerably better value for money for the technical academy project. All the accommodation proposed for the Free middle school has been built, or extensively refurbished, in the last nine years and will not require any capital expenditure. It has been viewed by three Capital Project Officers from the DfE this term, all of whom confirm that this is the case and that the accommodation will provide excellent provision for 400 pupils in years 5-9. Furthermore this plan ensures that two of the Trust's sites will cater for students in both the middle and upper phases (years 5-13 on each site), reinforcing the concept of an all-through

E1 – provide valid evidence that there is a need for this school in the area

school.

Thus there is a clear need for these places and parents will not accept the alternatives offered to them. However, by using the existing Trust sites to accommodate parental preference, our plan enables the local authority to continue with its proposals for the existing Howard middle site.

The Trust made a successful application in May 2015 to open a Technical Academy as a Free School for 13-18 year olds in September 2017. In that application, it was clear that this gave the Trust 330 places across its upper phase provision. This number of places is necessary to meet parental demand and to make the two distinctive 13-18 provisions viable. In that application, it was made clear that the Trust would need 315 middle phase places to feed into the upper phase of its all-through structure (the other 15 coming from the independent sector at age 13). It was explained that 100 places would go with the closure of Howard middle school and Section H explained how these places would be replaced using the Trust's existing sites. This is the plan outlined above. With a Free School providing the extra places, the Trust will have permanent accommodation for 315 pupils in the middle phase. Without it, the Trust can only take 215 pupils in the middle phase so the upper phase cannot fill and that would put the Technical Academy in jeopardy.

Parental demand consistently shows that there is a need for these places. The Borough of St Edmundsbury's Vision 2031 statement shows the need for additional school places in the area and significant numbers of parents want these to be within our All-Through Trust. Suffolk remains of concern to both Ofsted and the Department for Education while our Trust continues to be regarded as an exception to the overall standards and parents demand access to our 'outstanding' provision. The number of RI and Inadequate schools in Suffolk ensures that there are more than 100 pupils in each of years 5-9 being educated in such schools who could be educated in our proposed Free School led by an Outstanding school.

Furthermore, the Technical Academy is very well supported by parents and businesses who will be extremely disappointed if the lack of middle places prevents it from going ahead. It is also the only distinctive provision in Suffolk. This application and that for the Technical Academy are inextricably linked. The Trust's bid for the latter was encouraged by the Right Honourable Nicky Morgan and Lord Nash with strong support from both local MPs (Jo Churchill and Matthew Hancock). Their letters can be found in the Appendices of our May 2015 application.

Thus need has been demonstrated in terms of standards, parental preference, enabling a distinctive provision to open and future growth in pupil numbers. The local authority has plans for the other schools in the town. Excluding the Catholic pyramid, currently there are 540 middle school places. These, together with some pupils aged 13 moving into the town's provision at that stage (from the local prep schools and well out of area) feed into the 610 upper school places in the town. From September 2016, the LA plan requires 280 pupils approx. to fill its existing town school as it opens as a High school, with an already determined lower PAN, and to fill the town places in its new school on the Moreton Hall. The rest of the latter's places will be taken from East of the town not currently accessing town schools. This leaves the difference (610 – 280) for our All-Through Trust. That is, 330 places which is exactly the combined PANs of the existing two middle academies and the proposed PAN of the new Free middle provision.

E1 – provide valid evidence that there is a need for this school in the area

Please tick to confirm that you have provided evidence as annexes:

E2 – successful engagement with parents and the local community

This section will need to be completed by **all** applicants. Please:

- use the space provided below;
- include evidence as annexes; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

E2 – successful engagement with parents and the local community

Engagement with parents and the local community has been ongoing since 2010. The local community has consistently rejected plans to sever its links with County Upper School and urged the All-Through Trust to find a way to continue to accommodate its children. Formal meetings have been held with the Chairman of the Trust Board throughout the last five years. Most recently, meetings were held in March, June and October of 2015. At all of these, parents made their support for this middle phase Free School abundantly clear. Their children already work as part of our All-Through Trust and they wish this to continue when their current school site is closed, against their wishes, in July 2016.

Pupils will continue their education with just a change of premises, rather than have to move into another pyramid of schools with which they have never engaged. These pupils live in the most deprived ward in St Edmundsbury and one of the most deprived in Suffolk. Much of the data is on a par with Lowestoft. They have always been well served by the upper school in the Trust and it is only right that this should continue.

This application is part of a wider plan which should see a Technical Academy open within the Trust in September 2017. For this to happen, the numbers have to come through from the middle phase and so this Free Middle school is crucial to the provision of this distinctive provision. Engagement with the local community, businesses and the University of East Anglia was all set out in the Trust's successful May 2015 application and showed wide-ranging support.

In summary, the demand for this second Free School already exists and its first cohorts of pupils are ready to take up places in September. It will fit into an existing Trust whose website and other documents are already available. Parents at the following postcodes have already submitted their intention to apply for places in years 7 and 8 in

Section F – capacity and capability

Please note:

If you are not an approved academy sponsor, 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.

F1 (a) Skills and experience of your team

All applicants will need to complete this section, but you will give us different information depending on which type of group you are. Please refer to the relevant section of the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

If you are a sponsor with at least one school, or a MAT with at least two schools, and you have a letter or email from your RSC office saying how many free schools you have capacity to open, you need to:

- Tell us **who (a named individual) is in charge** during pre-opening and provide their CV.

If you do not meet the criteria set out above, please:

- complete the table below; and
- provide a short commentary on your plans to manage the pre-opening project.

You must complete a separate line for each member. Please identify individuals who will be company members, trustees, the chair of trustees, members of the pre-opening team and if applicable, the local governing body, including the chair if they have been identified.

Name	Where they live (town/city)	Member of core group	Role(s) (pre-opening team, member, trustee, principal designate, local governor once school is open)	Summary of relevant expertise Please refer to the relevant section of the assessment criteria booklet to check what detail you need to give	Available Time (hours per week)

[Add lines as appropriate]

F1 (a) Skills and experience of your team

[Insert a short commentary on your plans to manage the pre-opening project here.
Table expands]

F1 (b) Skills gap analysis

This section will need to be completed by **all** applicants. Please set out any skills gaps that you think exist within your group and how you intend to fill them. Please:

- complete the table below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

Skills/experience missing	Where is the gap? ie pre-opening team, trustees, local governing body	How and when do you plan to fill the gap

[Add more lines as appropriate]

F2 – a governance structure, and roles and responsibilities that will ensure accountability and effective decision making in this academy trust and drive improvement in the new free school

All applicants will need to complete this section in full for each school they wish to open. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

F2 – a governance structure, and roles and responsibilities that will ensure accountability and effective decision making in this academy trust and drive improvement in the new free school

[Add text here. Table expands]

F3 – independent schools have a good educational track record and credible plans for meeting the standards of the state sector

This section is for independent converters to the state sector only. Please:

- use the space provided below ; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

F3 – independent schools have a good educational track record and credible plans for meeting the standards of the state sector

[Add text here. Table expands]

F4 – Independent schools have a good financial track record and credible plans for meeting the standards of the state sector

This section is for independent converters to the state sector only. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

F4 – Independent schools have a good financial track record and credible plans for meeting the standards of the state sector

[Add text here. Table expands]

F5 – Independent schools have an appropriate, well-maintained, and secure site

This section is for independent converters to the state sector only. Please:

- use the space provided below; and
- refer to the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

F5 – Independent schools have an appropriate, well-maintained, and secure site

[Add text here. Table expands]

Section G – budget planning and affordability

All applicants will need to complete this section, but you will give us different information depending on which type of group you are.

Please:

- complete the Excel spreadsheet (where necessary);
- add any commentary you want to include in the space provided below, for example, explaining the costs of centrally provided services (we do **not** want you to provide a commentary on the whole budget, please only include particular areas you want to highlight); and
- refer to the relevant section of the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

G1 – budget planning and affordability
[Add text here. Table expands]

Section H – premises (use Excel spread sheet)

This section will need to be completed by **all** applicants. Please:

- complete the Section H tab in the Excel spread sheet; and
- refer to the relevant section of the background information and glossary document, and the assessment criteria booklet for what should be included in this section.

Annexes

This section will need to be completed by **all** applicants. Please:

- Provide CVs of key individuals as set out in the criteria booklet and any letters of support and maps.
- Any annexes are excluded from the page limit, but should be submitted as part of your application, ie as one Word document.
- Refer to the relevant section of the background information and glossary document and the assessment criteria booklet for what should be included in this section.

CV template

CV template		
1	Name	
2	Area of expertise (ie education or finance)	
3	Details of your last three roles including: <ul style="list-style-type: none"> • name of school/ organisation • position and responsibilities held • length of time in position This should cover the last four years. If not, please include additional roles	Name: Position: Dates:
		Name: Position: Dates:
		Name: Position: Dates:
4	For finance only: details of professional qualifications, including: <ul style="list-style-type: none"> • date of qualification • professional body membership number • how your qualifications are maintained 	
5a	For education only: if you are in a leadership position in your latest school (where available): <ul style="list-style-type: none"> • the school's results for the years you were in post – these should include, as appropriate, Key Stage 2 results, 5A*-C GCSE including English and maths results or, for 16 to 19, average point score per entry and per student for level 3 	

CV template	
	<p>qualifications</p> <ul style="list-style-type: none"> school's best 8 value added scores for the years you were in post, if applicable
5b	<p>For education only: if you are in a teaching or head of department role in your latest school (where available):</p> <ul style="list-style-type: none"> Your subject/department's results for the years you were in post, compared to your school's averages – these should include, as appropriate, Key Stage 2 results, 5A*-C GCSE including English and maths results or, for 16 to 19, average point score per entry and per student for level 3 qualifications
6	Brief comments on why your previous experience is relevant to the new school
7	Optional: brief comments on how the role you played helped to raise standards in any or all of your three previous roles.
8	Reference names(s) and contact details

Self-assessment form for independent schools

Name of school						
Girls/Boys/ Co-educational		% Special Educational Needs	% Free School Meals (or pupils on bursaries)	% English as an Additional Language	% Persistent Absence	% Attendance
Name of principal		Additional information about the school				
Chair of governors		[Please provide details about your school's site, physical environment and any finance issues, including any debt you may have.]				
Number of pupils currently on roll						
Capacity						

Your assessment against Ofsted framework (please provide a commentary) Review outcomes - current position		Your self-assessed Ofsted grade (1-4)	Required position - risks, actions plan (including priorities identified) and timescales
Overall Position	[Please provide an overall commentary on your school, with reference to the Ofsted grade descriptors, please delete this guidance before submitting this form]		
Achievement of pupils at your school	[This area is key in terms of present and future projections and actions to be undertaken. It is focused on pupil progress from clear baselines and should be related to national grouped data. The quality of pupils work across subjects, their skills in reading, writing, communications and mathematical skills across the curriculum Closing the gap for all pupil groups and ensuring that SEND pupils achieve Data and data tracking systems including intervention strategies to ensure pupil progress should be reviewed. The use of comparator measures and of validation/moderation will be essential to ensure reliability. please delete this guidance before submitting this form]		

<p>Quality of teaching in your school</p>	<p>[In this area, one might expect to see a clear understanding of teaching quality across the school and accountabilities to ensure the dissemination of outstanding practice and delivery of performance management. Staffing structure and accountabilities in relation to the curriculum and any new curriculum changes that might be developed due to the changing nature of the intake. Consistency of student presentation of work and scrutiny reference progress and standards How marking, assessment and students feedback/reflection enhances pupil learning Teaching strategies including setting of appropriate homework, together with a review of support and intervention strategies to match pupil needs How teaching promotes pupils learning and progression The review should be validated externally to ensure moderated outcomes for the school Reading, writing, communication and mathematics across the curriculum. Tutor and pastoral time including SMSC and British values please delete this guidance before submitting this form]</p>		
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<p>Behaviour and safety of pupils</p>	<p>[Please refer to the Ofsted handbook and supplementary handbooks eg Keeping Children Safe in education for further guidance.</p> <p>Some areas for inclusion might include; SCR, Safeguarding policy, training including Prevent and procedures. This area should be validated through a formal external safeguarding review and case studies. Health and safety procedures, policy, training and again supported by clear validated evidence.</p> <p>Data on key areas such as attendance (grouped data), persistence absence, exclusions compared to national data sets</p> <p>Student questionnaires and reviews as evidence to support outcome conclusions. Parental questionnaires and where appropriate business partners.</p> <p>Pupils attitudes to learning and the creation of a positive ethos</p> <p>Mock Ofsted information on behaviour and behaviour management strategies, policies and procedures please delete this guidance before submitting this form]</p>		
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<p>Quality of leadership in, and management of, your school</p>	<p>[This area focuses on the impact of leaders and governors and should look at how safely, efficiently and effectively the school is run. This area covers leadership and management across the school and how it enables pupils to learn, achieve and overcome specific barriers to learning.</p> <p>The Ofsted framework identifies detailed areas for review as does the National College such as the headteacher Standards however these need to be validated by others such as an NLE, SLE, NLG or an evaluation by a partner outstanding school.</p> <p>Key to this area is how accurately the team evaluate the schools strengths and weaknesses and use their evidence to secure future improvements. It should also include a focus on capacity of leadership and management to manage the change from independent school status to an academy with a larger and more diverse cohort of pupils.</p> <p>please delete this guidance before submitting this form]</p>		
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<p>The extent to which the education and systems provided by your school meets the needs of the range of pupils at the school, and in particular the needs of disabled pupils and those who have special educational needs.</p>	<p>[pupil recruitment and how the education will be adapted to meet the needs of all - progress on financial planning and cash management systems, including appointment of finance director - budget predictions and resource for ongoing budget management - trust's plans for ensuring funding agreement compliance - ensuring adequate systems and controls in place, including accounting software package please delete this guidance before submitting this form]</p>		
<p>Any other comments or observations not captured above. Please note, AP schools should state whether they are registered and if their existing provision is interwoven with the LA.</p>			

Governance self-assessment

Your assessment against the Governors and Academies Financial Handbook	Your assessment of current position (How you do it now)	How will you get to required position? (F2) – Please list risks, actions plan (including priorities identified) and timescales
<p>1. The roles and responsibilities of the directors/ trustees</p>	<p>Please detail your duties as:</p> <ul style="list-style-type: none"> • company directors and charity trustees; • accounting officer <p>Understanding of the strengths and weaknesses of the school.</p> <p>Understanding performance data (what data do you use), how do you use it to ensure robust oversight of performance (including externally provided data for example data dashboard the school presents)</p> <p>Holding school leadership to account</p>	
<p>2. Structure of the board</p>	<p>Accountability system</p> <p>Structure of decision making</p>	

3. Meetings	Please detail your board and committee meetings schedule and outline agenda		
4. Finance	<p>Please give details of:</p> <ul style="list-style-type: none"> • your chief financial officer, with appropriate qualifications and/or experience; • Schemes of delegation; • Approvals process-budget; • Investment policy; • Procurement including leases; • Internal control framework; • Contingency and business continuity plan; • Insurance cover 		



Department
for Education

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Reference: DFE-00222-2015



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