



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

ELMBRIDGE FREE SCHOOL

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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?	✓	
2. Have you provided information on all of the following areas (where applicable)?		
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	n/a	
Section H: Premises	✓	
3. Is the information in A4 format, using Arial 12 point font, and includes page numbers?	✓	
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?	✓	
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 your 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?	✓	
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	✓	

* 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
<p>12. Have you sent:</p> <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 <p>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?</p> <p>(See guidance for dates and deadlines)</p>	✓	

Declaration

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

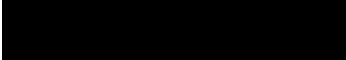
I confirm that the information provided in this application is correct to the best of my knowledge. I further confirm that if the application is successful the company will operate a free school in accordance with:

- the requirements outlined in the 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: 

Print name: 

Date: 27th February 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

Proposal Summary

The ElmWey Learning Trust (ELT) is submitting this bid to set up a free school in the Borough of Elmbridge, Surrey. Elmbridge Free School will be a non-selective, mixed, 6FE, 11-16 secondary school. It will meet a basic need for additional secondary places in the Borough which cannot be met by the existing provision.

Our vision is that the school will provide outstanding educational outcomes for all, meeting the aspirations of parents and students and enabling our students to progress to further and higher education and maximise their career opportunities. Our vision is that the new school will be a place where progress and attainment are embraced, supported and enabled by students, parents and staff. Students will leave our school proud of their achievements and well prepared for their next steps in life. Our school will significantly enhance secondary education in Elmbridge.

The Trust currently operates Heathside School, a successful 11—18 mixed comprehensive, 3 miles from proposed site of the free school. As a result of the performance of Heathside School, the Trust meets the criteria for a 'strong track record'. The Trust will seek to replicate the ethos and performance of Heathside at Elmbridge Free School.

The planned schedule is to open to an initial intake of 150 students in September 2019, rising to 180 students in 2021.

Rationale

There are three key elements to the rationale behind Elmbridge Free School:

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

1. Meeting local Basic Need.
2. Providing higher educational standards and increasing local choice and diversity.
3. Responding to local demand.

1 Local Basic Need: Full details of the projected local Basic Need, including statistical data and maps, are set out in section E1 of this bid. In summary there is a predicted shortfall of 138 secondary school places in the Borough in September 2019, rising to 215 places in 2022. These calculations take into account all other known planned secondary school developments in the area and are based on all other providers operating at full published capacity. The planned size, expansion profile and timing of Elmbridge Free School will meet this known and real need.

We are conscious of the sensitivities surrounding the potential impact that a new Free School may have on existing providers in the locality. In submitting this bid and opening the new school, the Trust will seek to avoid any detrimental impact on the existing Elmbridge secondary providers. The local basic need data (section E1), shows that the full capacity of all Elmbridge secondary schools, including the new Free School, will be required to provide sufficient places for the (known) student population. Should there be a change in the projected numbers prior to opening, we would work collaboratively with the existing providers to minimise any negative impact.

2 Higher Educational Standards, Local Choice and Diversity: A core aim of Elmbridge Free School is to provide high educational standards with progress and attainment at least mirroring the high levels currently achieved by ElmWey Learning Trust at Heathside School. Comparative performance data for the existing local secondary schools is set out in section E1 of this bid. In summary the two schools closest to the proposed free school have attainment and progress measures significantly below values for Heathside School and the target values for Elmbridge Free School.

At present there is minimal choice of secondary school for parents living in the area. Access to schools to the North and North West is limited by the natural boundary formed by the Thames and the lack of river crossing points. The two higher performing local secondary schools are regularly and heavily oversubscribed and as a result of 'proximity' admissions criteria, not accessible to residents of the planned locality.

Successful development of Elmbridge Free School in the planned area would raise local standards and enhance local choice.

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

Intake: Student Profile

Based on an analysis of primary and secondary school cohorts in the locality of the proposed free school, we believe that Elmbridge Free School will have an intake with a slightly higher level of deprivation and slightly lower prior attainment than Heathside School. The planned curriculum and support will be adjusted to take these factors into account as set out in section D.

Elmbridge Free School: Key Features

Location: Elmbridge, Surrey, serving Walton-on-Thames, Molesey and surroundings.

Age Range: 11-16 (links with ElmWey Learning Trust/Heathside School Sixth Form will be used to support preparation for and access to post-16 study).

Gender and Admissions: Mixed, non-selective.

NOR: Full capacity: 6FE, 900 students, initial entry 150 (2019), 180 (2021).

Faith: No affiliation

Curriculum: Broad and balanced, based on National Curriculum but with focus on enabling high academic aspiration and achievement for all. Strong and sustained focus on Literacy and Numeracy. Designed to support high EBacc uptake at KS4 but with vocational options to reflect likely intake profile.

Overarching Vision: ElmWey learning Trust (ELT) and Elmbridge Free School

Current Status: The Trust was incorporated in June 2015 in preparation for Heathside's conversion to Academy Status on 1st September 2015. Heathside has a long and successful track record of innovation including early adoption of both Grant Maintained Status and Specialist Technology College Status. The Trust was set up as a MAT since, from the outset, it was intended to expand its field of operation to manage and support other schools in addition to Heathside school. Currently Heathside is the sole school within the Trust.

Expansion Strategy: In the short to mid-term the Trust plans to expand to include at least one more Secondary school; this bid forms the focus of that initial expansion. Further expansion in the secondary phase is envisaged as is expansion into the primary phase, to grow an effective and efficient MAT serving, initially, the local area. Expansion will be carefully matched to both the capacity of the MAT and educational needs.

Educational Vision and Ethos, ELT:

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

- To realise every child/pupil’s potential (irrespective of their gender, race, ability or background) by providing the best possible education with students being the centre of all that we do.
- To support all partnership schools in maintaining outstanding, or working to achieve outstanding status.
- To engender a sense of challenge, enjoyment and passion for learning in all students.

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.

	Current number of pupils (if applicable)	2017	2018	2019	2020	2021	2022	2023
Reception								
Year 1								
Year 2								
Year 3								
Year 4								
Year 5								
Year 6								

Year 7				150	150	180	180	180
Year 8					150	150	180	180
Year 9						150	150	180
Year 10							150	150
Year 11								150
Year 12								
Year 13								
Totals				150	300	480	660	840

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
Key Stage 3			Timetable: 30 x 50 minute lessons per week, one week cycle to replicate Heathside School.
English	3.3	Mandatory	Additional time for intervention groups, see text section below.
Mathematics	3.3	Mandatory	Additional time for intervention groups, see text section below.
Science	3.3	Mandatory	
MFL	3.3	Mandatory	
Geography	1.7	Mandatory	
History	1.7	Mandatory	

PE	1.7	Mandatory	
RE	0.8	Mandatory	
Computing/ICT	0.8	Mandatory	Emphasis on early introduction of coding, see text section below.
Music	0.8	Mandatory	
Drama	0.8	Mandatory	
Art	0.8	Mandatory	
Design Technology	1.7	Mandatory	
PSHE	0.8	Mandatory	
Total per week	25.0	Mandatory	
Enrichment	2.0	Voluntary	4 x 1 hour, after-school sessions offered per week, Monday to Thursday (students opt for 2)
Key Stage 4			
English	4.2	Mandatory	
Mathematics	3.3	Mandatory	
Science	5.0	Mandatory	Time shown for triple science
MFL	2.5	Mandatory	
Geography or History	2.5	Mandatory	Open option if EBacc not compulsory, see note in text.
Option 1	2.5	Mandatory	
Option 2	2.5	Mandatory	
PE	1.7	Mandatory	
RE	0.8	Mandatory	
Vocational Course	5.0	Voluntary	Day release one day per week for students following this option.
Total per week	25	Mandatory	
Enrichment	2.0	Voluntary	4 x 1 hour, after-school sessions offered per week, Monday to Thursday (students opt for 2)

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

Curriculum plan summary

We are seeking to replicate the ethos, standards and performance of Heathside School at Elmbridge Free School. As a result, the curriculum will closely match that in place at Heathside with some adjustments to cater for known and likely differences between the intake profiles of the two schools.

Timetable structure

The Free School will follow a 6, 50 minute period day on a one week timetable cycle, emulating Heathside School and so facilitating a degree of shared staffing during initial development years. This staffing arrangement will give students access to a greater range of specialist staff.

Curriculum ethos

The curriculum will be based on the current National Curriculum. This provides an accepted and recognised 'Gold Standard', delivers breadth and balance and meets the needs and desires of pupils, parents, FE providers and employers alike.

Literacy and Numeracy are at the heart of student development. We believe that the curriculum must deliver qualifications in the core subject areas that will maximise student progression and future opportunity. Our curriculum will be centred on English and Mathematics and the other core EBacc subject areas, as gaining this group of qualifications will best enable student progression. This portfolio of subjects will remain respected and expected by employers, FE and HE providers for the foreseeable future. We hold that Literacy and Numeracy are key factors in progression in many other subject areas and are the cornerstones of academic achievement.

Alongside this core there will be sustained support for a wider range of subjects so as to enable access to a greater range of careers, whilst also developing the breadth of students' knowledge. At Key Stage 4 this will include vocational courses so as to allow rapid transition to certain career paths and match the needs and aspirations of the likely intake.

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

Our curriculum will enable the development of our pupils into young adults through a robust PSHE and enrichment programme. This will be 'values led' and at all stages be based on our core set of values which stem from recognised British Values and awareness of our multicultural society.

A key feature of our curriculum is that we will use, for both KS3 and KS4, the same specifications, external assessments (i.e. examination boards) and schemes of work at both the new Free School and Heathside School. This replication will enable the Free School to utilise existing experience and knowledge at Heathside, enable effective comparative tracking of the two establishments and provide enhanced CPD through joint provision and so provide comprehensive curriculum support for the new school. When established this will also allow for moderation and standardisation with a sharing of training and good practice across the MAT. Uniform specifications will be particularly important during its growth phase when staffing numbers are low and the need for support will be higher.

Key Stage 3

Setting and streaming

Lessons in core subjects will be taught in ability based groups; all groups will follow a common curriculum. We believe this will provide the best model for securing maximum progression for all students. Student performance will be tracked half termly and classes will be re-set annually on the basis of this tracking and in cases of clear mis-setting, termly. Further details are given in section D2. Interventions linked to likely intake profile are described further on in this section (D1).

Subject specific information: English and Mathematics

To reflect the importance we attach to these core subjects, key features and foci of the curricula for English and Maths are given below:

English: Clear focus on reading, extended writing and developing communication confidence.

A sustained emphasis on developing reading skills, assessing student reading performance and providing additional support wherever necessary. An early focus on developing students' extended writing skills, building on the grammatical rigour now being developed in the Primary phase. Our curriculum will use this to develop extended writing skills throughout KS3 in preparation for the recently increased emphasis on this at GCSE level.

Mathematics: Development of 'Numeracy' as a recognised skill.

At our new Free School 'Numeracy' will be just as prominent as 'Literacy'. We will place a clear emphasis on developing mastery of mathematics and mathematical fluency

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

within the curriculum at KS3, whilst remaining grounded in the current National Curriculum specification. We will incorporate carefully chosen elements of proven national and international approaches to maths teaching, including the Shanghai pedagogy, in particular embedding number skills and algebraic manipulation. We believe that these two areas provide the basis for further progress in maths.

Primary/Secondary transition and 'Learning to Learn' (L2L) skills.

Heathside school is proud of its extensive liaison with feeder schools, its induction programme and recently introduced L2L programme delivered to new year 7 students in their first term. These aspects of the broader curriculum will be modified to meet the needs of the different intake of the new Free School. We recognise that delivery of, and progress in, these areas must be consistently exemplary in the early growth years for a new school if we are to achieve our core objective of providing outstanding education for all. In addition, any intervention activities provided for incoming year 7 students at Heathside will be accessible to the students about to enter the Free School.

We will carry out liaison activities for year six students likely to join the Free School, delivering curriculum material via outreach and through student visits to the secondary school. This highly successful model operates at Heathside; in the pre-opening phase we will use Heathside School to host these events. For the first entry we will run an extended induction at the new school, or at Heathside should the new build not be completed.

Our existing year 7 'Learning to Learn' (L2L) programme will be replicated at the new school, but with a greater emphasis on literacy, numeracy and confidence building skills.

The key content of L2L for Year 7 is designed to develop the following attributes and skills for all students:

- Active and reflective learning
- Resilience
- Problem solving
- Interpersonal and relationship skills

Key Stage 4

All students will study a set of common 'enabling' core GCSEs balanced with option choices. If the EBacc suite of subjects becomes compulsory, as is the stated intention of the DfE, the core will ensure EBacc compliance. Should the EBacc not become compulsory, we will still ensure all students have access to the full EBacc suite. All students will have the option of day release to follow a KS 4 vocational course, these

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

vocational courses will be recognised, high value qualifications that meet current DfE requirements for inclusion in performance tables.

Core GCSEs (assuming compulsory EBacc) will be:

- English Language
- English Literature
- Mathematics
- Double Science
- MFL
- Geography or History

In line with our practice at Heathside, we may disapply a small number of students from the MFL requirement but take into account DfE directives and guidance operating at the time. Currently at Heathside all students can access the full EBacc suite, typically 70% do so and 44% gained the EBacc (Summer 2015). These high values are based on a 'free choice' option system which does not require study of a humanity. At the Free School we will adjust the option structure to reflect the prevailing national situation when the first cohort approach KS4 (2021/22).

Option GCSEs will include:

- Art
- Business Studies
- Computer Science
- Design Technology
- Drama
- Humanities (see EBacc note above)
- Media Studies
- RE
- Triple Science

We will modify this portfolio of GCSE options to take into account any changes to the range of recognised and accredited qualifications that occur prior to students starting their KS4 study.

Vocational (day release) courses would cover the following areas:

- Catering
- Hair and Beauty
- Engineering/Motor vehicle Mechanics
- Child Care

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

We know from our experience as Vocational Co-ordinators for the Elmbridge Consortium of Secondary Schools that these will be the subjects in demand and that we can access these courses via our links with local H.E. providers such as Brooklands College.

Non GCSE courses and qualifications delivered as part of the enrichment programme (see below) are likely to include:

- Graded music examinations
- Sports Leadership Award
- LAMDA
- UK Maths Challenge
- Arts Award
- Duke of Edinburgh Award

Enrichment curriculum and activities

In addition to the core timetabled day we would offer four enrichment sessions per week after the end of the normal school day, with the expectation that students attend a minimum of 2 sessions per week chosen from 2 different categories as listed below;

- Academic Study and Support
- Exercise, Sport and Healthy Living
- Creative and Performing Arts
- Life and Community skills

We believe that by setting up the enrichment structure in this way will increase student engagement and enhance every student's educational outcomes.

All school clubs would operate within these groupings, for example participation in the School Council or Duke of Edinburgh Award scheme would fit within Life and Community Skills category. We would aim to set up an in-school Combined Cadet Force (CCF) unit from year 8, which would operate within this Enrichment offer and would be based at the Free School; Heathside students would participate with the Free School students. At post 16 we would aim to establish the CCF provision at Heathside to ensure continuity.

Pupil populations, existing and proposed school

The preferred area for the new Free School is approximately 3 miles as the crow flies from Heathside school. Given the local population density and the current catchment

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

area and home postcodes of students on roll at Heathside, there is considerable overlap between the profiles of the likely intakes for the two schools but with some identifiable local variations. In summary the range of student abilities is similar, but the distribution, with a higher proportion of mid to lower abilities, will be slightly different. Our curriculum plans take these differences into account; the approach adopted at Heathside will, we believe, be fully effective but adjustments will be made to the capacity for support of certain groups of student.

We have identified any potential differences by analysing intake data for all existing secondary schools in Elmbridge and considering any data available from primary schools in the locality of the planned Free School.

In summary we believe that key intake indicators for the existing school (Heathside) and the proposed school will be as follows:

School	KS2 APS on entry	% FSM (Ev 6)	% EAL	% EHC plan
Heathside 2015 values	29.1	10.3	7.9	1.7
Elmbridge Free School estimated values	28.0	22.0	11.0	2.5

Curriculum changes and differences; Response to pupil population differences

Key Stage 3

At Heathside School the ElmWey Learning Trust uses a proactive approach to setting and intervention in Key Stage 3, matching the structure to the intake profile for each particular year group. Students are assessed on entry and teaching groupings confirmed by Autumn half term, based on all available data. Our current model uses setting in some core subjects, e.g. mathematics, with mixed ability and 'tutor group' teaching in others. This ensures students work in a variety of groupings with their peers, but enables differentiated teaching, in particular in Mathematics. The model is checked and adjusted for each Autumn's intake.

This approach will be replicated at the new Free School and as a result setting and intervention will be matched to the intake cohort of each year.

Given the likely intake profile there will be a need for enhanced additional support in English and Mathematics, and a slightly higher demand for support of students in the

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

SEND/EHC category. We will not adjust the breadth or aspirations of the curriculum compared with Heathside; adjustments will be through increased additional support for students with 'catch up' need. We will address these issues as follows:

English and Mathematics catch up support

At Heathside all students in year 7 have one lesson per week allocated to Literacy with a focus on reading, with progress being tracked continually (see section D2). All students in need of catch up (i.e. below level 4) are withdrawn for additional catch up sessions in small groups or in some cases via individual tuition. Heathside school operates a fully staffed 'Learning Zone' for withdrawal and catch up work for students from all year groups.

This system and resource will be replicated at the Free School but at an enhanced level of provision to meet the likely higher demand. In particular for the weakest of students we will adjust the year 7 curriculum so that MFL is replaced by additional literacy and/or numeracy lessons according to individual student's need. We believe that mastering communication and numeracy skills are a priority for these students in order to be able to access the whole curriculum in subsequent years.

SEND/EHC support

As for Literacy and Numeracy support, we believe that our SEND systems in place at Heathside are robust and effective and that they should be replicated but with an increase in capacity to meet the needs of the intake cohort at the new Free School.

We believe that effective staffing and parental engagement are two keys to success in SEND support. We would seek to recruit wherever possible Teaching Assistants who aspire to HLTA or qualified teacher status and so enhance the quality of SEND support in place.

At the new Free School we would seek to increase the level of parental engagement for students in need of catch up and additional support. This 'family learning' would be based around after school sessions where subject teachers deliver core material to students working alongside their parents/carers. This would be another extension of a programme in place at Heathside, with an increase in provision being put in place to meet the greater local need.

Key Stage 4

As at KS3, we believe that the core KS4 curriculum in place at Heathside will suit the needs of the new school's intake, provided adjustments are made in terms of capacity. In particular at Key Stage 4 we would maintain top-end stretch through access to the EBacc suite for all, the option to study Triple Science and the enrichment offer of a second MFL and Additional Maths. Whilst all students will have access to the full EBacc

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

suite and will be encouraged where viable to follow this route, an alternative non MFL GCSE route will be available in line with prevailing DfE guidance or direction.

The KS4 vocational offer will be developed in collaboration with the 14-19 Elmbridge Consortium for Secondary schools. Currently Heathside School manages this aspect of the curriculum on behalf of the Elmbridge Consortium, negotiating joint provision by a local post-16 provider, Brooklands College. As a result course range and capacity to match the intake will be ensured.

EAL

There are some year-on-year fluctuations in the proportion of EAL students at Heathside however outcomes for these students at Heathside is good. As a result we do not believe that the differences in the table above will necessitate significant change of approach between the two schools.

Teaching and Learning: Ensuring consistency of approach and standards achieved

In seeking to replicate the ethos, standards and performance of Heathside School at Elmbridge Free School, it is essential that there is consistency of approach and standards for Teaching and Learning between the two schools. The terms of reference of the ElmWey board will incorporate a requirement to compare and review the consistency of provision across schools within the Trust. We believe the key to ensuring consistency is a management structure and system that actively tracks both schools, draws frequent comparisons and responds to discrepancies.

To ensure consistency of the curriculum and Teaching & Learning, the following strategies will be employed in the growth phase, i.e. the first five years of operation:

Consistency of offer: Curriculum managers and subject leaders from the two schools (see organogram in section D3) will meet half termly to confirm curriculum content and delivery planning, so that wherever possible structure, pace and content are replicated.

Consistency of delivery: Led by the Executive Principal and senior leadership teams from the two schools, teacher performance management and 'drop in' joint and common lesson observations will be carried out half termly and results analysed to quantify the consistency of provision between the two schools. This process will be duplicated in terms of pastoral care to ensure the consistency provision and support.

Consistency of outcome: Led by the Executive Principal and senior leadership teams from the two schools, tracking data from the two schools will be analysed to ensure consistency (see also section D2 below).

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

Pupil performance tracking and target setting: Summary

The ElmWey Learning Trust would seek to replicate the pupil tracking and target setting systems in place at Heathside school with appropriate adjustments to account for likely variations in intake.

In all year groups the target is to complete formal tracking at half termly intervals and set outcome targets which place our students' progress in the top quintile nationally. This policy will be replicated at the new Free School. Since it is progress based it is not fundamentally affected by intake starting points. A combination of in-house spreadsheet based tools and commercial products, including 4matrix and FFTAspire will be used.

The system can be summarised as follows:

Key Stage 3. With the removal of the requirement to use 'Levels' and changes to KS 2 assessment procedures, the system in use at the Free School will be developed from the Year 7 system introduced at Heathside in September 2017.

Student baseline data currently used is KS2 NC level, in addition students are assessed using MidYIS on entry. Student performance is measured half termly in each subject area and progress of students and groups of students analysed. Parents are advised of progress on a termly basis.

For the current year 7 (autumn 2015 entry) a 'flight path' system has been developed. Year 7 trajectories are set for each student in each subject based on KS2, MidYIS and initial assessment data. Performance is checked termly, analysed by school management and reported to parents.

D2 – measuring pupil performance effectively and setting challenging targets

This methodology will have completed one complete KS3 cycle and been refined by the time of opening of the new Free School. We plan to replicate the system in place at Heathside at the new school.

Reading ability will be tested for all students on entry and tracked at the end of each year during key stage 3. Those students' whose reading level lies below the recognised threshold for intervention (currently level 4), will have diagnostic testing to determine specific reading programme interventions. Those with a reading age exceeding their chronological age will develop the extent of their reading via accelerated reader. In addition any student diagnosed with a recognised reading need will receive appropriate intervention.

Key Stage 4: In the past at Heathside School, core target grades have been set using FFT type D values as a baseline for all students and subjects. Performance tracking and residuals were referenced to these values. For some creative arts subjects MidYIS estimates are used to cross reference due to the finer discrimination for arts subjects by this system. With the restructuring of the FFT system to FFT ASPIRE, ElmWey has moved to a combination of FFT20 and 'intelligent' grades. This methodology, which will have been refined through its initial years of use, will be replicated at the new school.

Differences between existing and proposed school

The differences between intakes of the two schools will not affect the tracking and outcome measurement methodologies in use. There is however likely to be a difference in emphasis regarding key groups and appropriate targets.

With the new Free School likely to have a slightly less able intake, there will need to be a strong emphasis on meeting the needs of a larger cohort of less able/disadvantaged students. At the same time highly aspirational targets must still be set for the more and most able students and the 'middle' ability cohort. We believe that bringing a culture of high expectations for the most able from Heathside will best serve the most able students at the new school where they will sit in a broader ability intake.

Disadvantaged and More and Most Able students

As at Heathside there will be an expectation that all staff identify and proactively support disadvantaged students and offer differentiation and stretch to the more and most able. Replicating the approach in place Heathside, all disadvantaged students at KS4 would have a named teacher mentor to offer advice practical support and encouragement.

In the growth phase of the new school we would link activities for the more and most able with those on offer at Heathside, so giving access to a wider range of opportunities whilst achieving economies of scale. This provision would be linked to the after school enrichment programme (Academic Study and Support category). It would include, for

D2 – measuring pupil performance effectively and setting challenging targets

example additional mathematics, a second MFL option at KS4 and engagement with third party activities such as The Brilliant Club which offers university links to most able students. These initiatives are all currently operating successfully at Heathside School.

Approaches to assessment, target setting and behaviour: Ensuring consistency between the schools

We believe that the key to ensuring consistency is a management structure and system that actively tracks both schools, draws frequent comparisons and responds rapidly to discrepancies.

The proven systems for target setting and assessment in place at Heathside School, as described above, will be replicated at the new Free School. The overarching management structure, led by the Executive Principal will review these school functions at termly intervals with the leadership from each school. Within the governance structure this review cycle will be written into the overall scheme of delegation and accountability to ensure that this review and response cycle is carried out. As a result governance will hold management to account so as to ensure consistency across the Trust.

It will be a clear and stated function of Trustees to ensure that standards of behaviour and behaviour management systems are consistent and consistently applied across schools within the ElmWey Trust.

Establishing exemplary standards of behaviour and positive ‘behaviour for learning’ are seen as key factors in the success of the new school. We recognise that growing and developing a new school from a single year intake presents an outstanding opportunity to establish and embed high standards of core behaviour. The system currently in place at Heathside is based on an ethos of Values and Respect, encompassing recognition and praise for positive behaviour and a clear set of well signposted sanctions for unacceptable behaviour. Underpinning the ethos will be the Elmbridge shared values which are embedded, across phases, by most of the Borough’s schools.

At an operational level, weekly student panel meetings of year heads, the SENCo, SLT pastoral lead and non-teaching support staff will discuss student progress and behaviour and share strategies and actions in relation to those students requiring different levels of need. Feedback from these meetings will be a standing item on the weekly SLT meeting agenda, ensuring the Principal is fully aware of any issues and as a result able to feedback to the Executive Principal and hence ensure consistency across the schools.

Reporting to parents/carers: ensuring parental engagement and support

D2 – measuring pupil performance effectively and setting challenging targets

Parent and carer engagement is key to establishing high academic aspirations, positive attitudes to learning and high standards of core behaviour. All parents will receive termly progress reports. And a minimum of two face-to-face consultations per academic year.

We will ensure engagement through clear initial communication of expected standards of behaviour and an unambiguous home/school agreement encompassing our behaviour code. We will use an on-line feedback system, Schoolgateway, so that all parents/carers can track their child's positive and negative merit points in real time. Rapid communication with parents/carers in the case of behavioural issues is seen as paramount; we will, as at Heathside, operate an 'on the day' response time when communicating with parents on behavioural issues.

In parallel to systems which set standards for core behaviour and address any shortfalls, we believe that a key to student progress is to establish a culture of positive 'behaviour for learning'. This will be driven by positive feedback to students through a merit system directly linked to the school's 'House' structure, which will be set up via student voice, in the first year of operation. Developing, expecting and recognising positive student engagement will be incorporated in staff development and performance management. Our expectation of staff, students and parents/carers is that by joining the Free School, all will embrace and support this positive ethos that celebrates progress and success.

We will ensure that progress and attainment remain high profile within the school, through termly 'achievement' assemblies, House performance information and termly 'Principal's breakfast' events with nominated students. Parental engagement with success will be ensured through positive reporting via the school website, newsletter and individual praise postcards from each curriculum area.

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

NB: Organograms attached as annexes, see page 64 onwards.

Full operation staffing levels (see attached organograms)

Teaching: 51 FTE, Non-teaching support: 16 FTE, Pupil:Teacher ratio: 17.6:1

The organograms illustrate how staffing will grow over the first 5 years of opening until it is up to full capacity. Credible contingency plans to adapt the staffing structures for both the teaching and support staff will be made if income were to be less than expected or the school not to full capacity.

Teaching Staff

2019: In the first year of opening there will be 8 full-time teaching staff: School Principal, 1 Assistant Principal, 1 Head of Learning and 5 Heads of Department for the core subjects of English, Mathematics, Science, PE and MFL. In addition, there will be the scope to employ one multiple subject teacher. These staff will be recruited from Heathside School where possible. Senior staff and Heathside staff will be used to fill non-core subject teaching where necessary.

2020: Year 2 will add a SENCo, a second Head of Learning, Heads of Department for History, Geography and Technology with main scale recruitment in Maths, English, Science, and MFL. All other needs will be met by staff from Heathside. Surplus Free School staffing will, where possible, be utilised at Heathside and financed accordingly..

2021: Year 3 will add a Vice Principal and Heads of Department for; RE, Computing, Music, Art and Drama. Additional main scale teachers will include Maths, English, Science, MFL, PE and Technology.

2022: Year 4: an additional Assistant Vice Principal will be appointed and a Head of Business with 4 Second in Departments for Maths, English, Science, MFL. Further main scale teachers recruited will be English, Science, Humanities (according to options) and PE. A 3rd Head of Learning will also be recruited.

2023: Year 5 will involve the 3rd Assistant Vice Principal being recruited and a 4th Head of Learning. A second in PE will also be recruited. Final recruitment of the following main scale teachers will mean that staffing is up to full capacity; English, Science, Mathematics, Humanities, Computing and Media Studies.

2024/25: Further increase of 3 FTE staff (one may be a Head of Learning) to accommodate the final growth of the school to 900 NOR.

Support Staff

In the first instance to protect and allow senior leaders to focus on establishing ethos and best practice in teaching and learning, central services provided by Heathside will include; finance, admissions, HR, administration, IT support and site management. The SENCo, as a qualified teacher, is in the staffing structure above. On opening, there would be a HLTA and then TAs employed according to the cohort's needs. The TA

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

staffing level would be adjusted each year in order to ensure high level intervention and support according to SEND requirements.

The staffing support structure model shows central services on the left hand side and then support staff specifically deployed at the Elmbridge Free School on the right hand side.

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

Overview

The new Free School will be non-faith, non-selective and will welcome and meet the needs of all members of the local community. Reflecting and building on the ethos of the proposer, ElmWey Learning Trust and Heathside school, the new school's ethos will be based on tolerance and respect. The ethos will be founded on a set of agreed values which have been embraced at Heathside for many years and encompass core British values. These values coupled with the school's awareness of, and response to, safeguarding and welfare agendas, will engender a safe and inclusive learning environment where all are welcome and individual beliefs are accepted and respected. Through its existing provision in the locality and its extensive networking as part of the Elmbridge schools 'Values' project, ElmWey is aware of local demographics and how values based education can meet the needs of all and welcome all sections of the local community.

Based on data for existing local schools we believe that the likely intake for the new free school will be as follows:

Welcoming all faiths and none

At all times and in all publicity and communication with the local community and in particular with potential parents and carers, ElmWey will make a positive statement that the new school will be non-faith based and will welcome pupils of all faiths or none. We will make clear that whilst our ethos is itself values based and reflects British Values,

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

admissions, the curriculum and staffing are not in any way linked to specific beliefs or faiths. This outward stance is important in establishing and extending our welcome to all in the light of the number of faith based schools within Elmbridge. Within a two mile radius of the proposed site for the Free School, 2 out of 8 primary schools have a religious basis. One of the four existing secondary schools in Elmbridge, Esher Church of England High School, has a strong Christian ethos as a Voluntary Controlled School linked to the Diocese of Guildford.

Attracting pupils from all backgrounds

The Free School's outreach and primary school liaison programme will be offered to all primaries in the locality regardless of affiliation. This programme will be based on the long standing and successful model in place at Heathside. It will involve outreach visits to primary providers to cover agreed areas of the curriculum and extension activities. Additionally events at the Free School will be hosted for primary students where they can access equipment and resources not available at their home schools. Examples of the curriculum areas and resources to be used will include science, technology and sport. Our aim is to be as inclusive as possible and to be recognised as such by all in the local community.

In parallel with this liaison with the primary phase, we will establish links with local faith groups providing information on our provision, ethos and desire to offer welcoming, tolerant and inclusive education for all.

Values based education

For over 8 years Heathside School has been involved in developing a set of shared values with local Elmbridge schools. As a result of this programme, the School has adopted a core set of values and these will be replicated at the new Free School. The three core values are Endeavour, Respect and Trust, which are seen as key to the provision of outstanding education for all and the active engagement of students in their education.

This values led approach will be adopted at the new school, where following the practice at Heathside, a different aspects of the values will be the focus each month for assemblies, themed tutor group work and the value will be linked to the PSHE curriculum.

British Values

The British Values of democracy, the rule of law, liberty, mutual respect and tolerance are, in effect, embedded in the overall set of values referred to above and which will underpin the new school's ethos.

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

As at Heathside School, the ElmWey Trust will ensure that these British values are actively promoted throughout the year so as to develop levels of tolerance and respect that will make the school welcoming to all. This promotion will be by such methods as; themed assemblies linked to the whole school values 'cycle', promotion within the PSHE curriculum and in tutor time activities, promotion where appropriate within the academic curriculum in particular in the humanities and arts. In particular during daily tutor time students will work on a particular aspect of a British Value each week embedding awareness and understanding.

Background awareness will be raised through a sequence of themed paper and e-poster campaigns throughout the academic year, addressing each of the values and in particular British Values in turn. The e-poster approach would include incorporation into the school's screensaver, website home page and school video display screens.

Addressing the needs of pupils and parents

We will respect the right of all pupils, parents and carers and staff to meet their own obligations regarding religious observance. This position will be clearly set out in the home/school agreement for all students at the school and in all staff contracts.

Assemblies: Whole school, year group and House assemblies will be key to setting out the school's inclusive stance with regard to faith and world views. Our assemblies will link to the monthly values listed above, but also reference major religious festivals in order to foster awareness, respect and tolerance. An embedded feature of assemblies at Heathside, which will be replicated at the new school, is the inclusion of time for student reflection and contemplation. We will draw wherever possible on the support of a range of religious groups to help present these assemblies, once again to improve awareness and tolerance rather than promote any particular viewpoint.

In the growth phase of the new school we would envisage using staff and older students, including sixth formers and in particular the Student Impact Team from Heathside to deliver assemblies at the new school. This would ensure consistency of approach between the two establishments and give our new Free School students access to a wider age range of peers.

Curriculum content: Breadth and balance

We will ensure that our curriculum at all key stages is broad and balanced and is not prejudiced in terms of faiths and/or world views. We will draw on our successful experience at Heathside with regards to sensitive areas, such as evolution and sex education in science and the study of comparative religions in RE. We will inform all parents at the start of each academic year of any content that may be sensitive and give guidance on the process for withdrawal from lessons on religious or faith based grounds.

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

PSHE

All students at KS3 will have one lesson per week PSHE/SMSC and elements of these areas will also be covered in morning tutor time.

The PSHE curriculum which is in place at Heathside and will be adopted at the new school, has been recently developed from material published by the PSHE association. As a result we believe this a robust and contemporary course that engages and welcomes students. The core elements of PSHE for year 7 will be based around the themes of: Transition, Relationships, Health and Well Being, British Values and Living in the Wider World.

Safeguarding and relevant policies

All aspects of safeguarding will be overseen at Trust level to ensure full compliance and consistency between all schools within the Trust. This is reflect in ElmWey's Terms of Reference.

The school will be fully compliant with all aspects of safeguarding including for example site security, access, health and safety and staff recruitment issues. We will take advantage of the blank canvas presented by a new school to establish exemplary standards in respect of safeguarding. This will replicate the practice at Heathside which was graded outstanding by Ofsted.

The School's policies, both statutory and non-statutory, will be defined and set by the ElmWey Learning Trust. This will ensure both compliance with legal requirements and that policies are tried, tested and fit for purpose.

Safeguarding will of course extend to e-safety. As a school where we aspire to full digital access, ensuring on-line and cyber safety for all students is paramount. We will ensure that, as at Heathside, technology (Securus) is in place to protect our students whilst not unduly hampering their use of digital technology to enhance learning.

The Prevent duty

Meeting its obligations under the Prevent Duty is another area where the model, processes and experience from Heathside school will be replicated at the free school. All staff will undergo training to give them the knowledge and confidence to identify children at risk. There will be clear systems in place to record and respond to any concerns raised with the school's SLT DCPLO/safeguarding lead acting as a focus for any issues. The school will access external support, for example Channel, via the ElmWey Trust should the need arise.

Student welfare: Counsellor and HSLW access, bullying reporting and response

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

Ensuring a high level of student welfare is a key factor in welcoming pupils from all backgrounds and faiths and maintaining the core ethos of the school i.e. to ensure that all our students achieve their maximum potential.

The welfare system will be based around student centred pastoral care, backed up by robust intervention and support systems derived from statutory and non-statutory policies. The system will be based around the duty of care expected of and exercised by year heads and their non-teaching Student Support Coordinators, working closely with form tutors. We envisage that each Form Tutor will remain with their tutor group from year 7 – 11 so developing a good understanding of each student's needs. Weekly pastoral panel meetings will review and respond to cases of concern.

Under central provision from the ElmWey trust we will have access to a qualified counsellor and home-school link worker (HSLW).

Referral to the ElmWey school counsellor by the pastoral team will be in agreement with parents/carers. The school will also use ElmWey's home-school link worker to engage with hard-to-reach parents and carers, and improve attendance and engagement by vulnerable and disaffected students.

Students and parents/carers will be able to report concerns including bullying in person or by an on-line incident reporting system accessible via the website.

Developing awareness of and respect for other faiths and views

Whilst the new Free School will be non-faith based, its curriculum will be based on the National Curriculum and as a result will include RE lessons for all students. The KS 3 RE curriculum and programme of study will be based on SACRE guidelines and will include extensive study of a range of religions and belief systems. Delivery will be based around respect for all views, rather than promoting one particular viewpoint. By having RE in the curriculum the school will enable students to properly discuss different faiths and world views and explore their own. As a result of this taught curriculum and our values based assemblies and tutor time activities, we are confident that all students will develop a greater awareness of the range of belief systems in the modern world and do so from a stand point of respect and tolerance. This is particularly important in light of the predominately monocultural context of the new Free School and the National profile of the risk of radicalisation.

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
<p>NB Numerical data and maps attached as annexes, see page 64 onwards.</p> <p>Local basic need: Summary</p> <p>There is clear statistical data showing a rising future demand for secondary school places in the Borough of Elmbridge. In summary and as described in further detail below, there is a projected shortfall of 138 secondary places in the Borough in September 2019 (the target year of opening for the new Free School). This will rise to a shortfall of 215 places in September 2022. It is also clear that the existing secondary schools are unlikely to be able to meet this rising demand, as these predictions take into account all other planned school expansions.</p> <p>Existing Provision: There are five publicly funded schools in Elmbridge; locations of these schools are shown on the attached map (annex 1), performance measures for these schools are shown in the table in annex 2. The preferred ‘centre of location’ and proposed site of the new Free School is shown by the red triangle in all maps.</p> <p>In summary the existing schools are as follows:</p> <p>Heathside School: Possible expansion restricted due to size of site and existing planning condition on its site capping the NOR.</p> <p>Rydens Enterprise School and Sixth Form College (RES): Currently engaged in an EFA supported project to rebuild on current site and increase capacity from 8 to 10FE.</p> <p>Esher Church of England High School: Recently expanded from 6 to 8FE.</p> <p>Hinchley Wood School: 7FE no plans to expand.</p> <p>Cobham Free School (CFS): Currently in temporary accommodation in East Molesey, but plans to relocate to a new permanent site in Cobham over 4 miles from the identified area of need and proposed site of the new Free School. Published PAN 72 rising to 96 in 2017.</p>

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

Future demand

The forecast demand and the Local Authority place planning strategy are outlined in the table in annex 3. This data has been provided by the School Commissioning Office of Surrey Local Authority. The table shows the combined (total) area PAN for existing providers, including the planned expansion of Rydens Enterprise School (RES) and Cobham Free School. It also shows the forecast demand based on most recent data which is regularly updated throughout the year. The data is based on a three year trend of pupils moving in and out of the Borough, the latest birth data, the May 2015 primary school census data, housing approvals up to April 2015 and the Borough's housing trajectory up to 2026.

The penultimate row of the table shows the Combined Area PAN/Forecast Demand deficit, whilst the final row shows the new Free School PAN following its planned growth pattern as set out in this bid. As stated above, all figures take into account the planned expansion of RES and the Cobham Free School.

The table shows that there will be a deficit of 138 places in September 2019 rising to 215 by 2022. This rising demand cannot reasonably be met primarily by the Borough's existing secondary schools which will all be operating at full capacity by 2018.

With the new Free School, the combined area PAN will be 1206 in 2019, rising to 1236 by 2021. This would meet the predicted local demand for places from 2019 onwards. Some surplus spaces are generated by 2024/25, however the surplus is no greater than 5 - 6%. This is the figure that the Audit Commission (Trading Places report 1996) suggested was a reasonable balance for Local Authorities to hold in order to meet in-year admissions demands and unforeseen circumstances. It should also be noted that the more distant the forecast, the less reliable the data as the 2025 cohort of pupils is not yet in primary school.

The underlying birth trend in Elmbridge (Live Birth Data annex 4) remains above its 2008/9 value and house building has resumed since the national recession. These factors combine to indicate a mid to long term sustained and rising demand for school places in the Borough.

Analysis of where the demand is coming from

The home addresses of pupils on roll in Elmbridge primary schools have been plotted onto a map of the Borough. This analysis includes only students who will be eligible for a Year 7 place in 2018, 2019, 2020 and 2021. These maps are shown in annex 5 and provide strong visual evidence that the demand is located in the north of the Borough and extends to both the east and the west. This area is the planned location of the new Free School and the growth is consistent with the primary school expansions that Surrey County Council has undertaken in the previous 5 years.

Choice and Diversity

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

Admissions and parental preference for schools

In addition to the predicted underlying basic need shortage of places in the Borough as detailed in annex 3, it is clear from historic parental preference data that parents in the area do not have access to their preferred schools.

Parental preferences for the 2015 admissions round for each Elmbridge school are shown in annex 6; these should be read alongside school performance data shown in annex 2. This data shows high over-subscription for Heathside and Hinchley Wood (including 47 out of county) indicating very strong parental preference for the standard of education provided by those schools. The data reflects a similar pattern over many years. This level of oversubscription, coupled with the admissions criteria for these schools which favour those living closest, means that applicants from the immediate area of the planned Free School are unlikely to gain admission to either Heathside or Hinchley Wood.

In detail, all Elmbridge Secondary Schools with the exception of the Cobham Free School have agreed designated catchment areas, with two having named feeder primary schools. Heathside and RES do not have feeder schools and CFS, as a 5-18 through school, primarily admits from its own primary cohort. In due course, however, at the CFS 48 of its 96 places will be available to Surrey children living in the Cobham area, away from the centre of identified need shown in annex 5.

Local geographical factors

As can be seen from annex 1, the north and north west of the Borough and the preferred area for the Free School is bounded by the river Thames. There are no crossing points between the bridges at Walton-on-Thames and Hampton Court, labelled X and Y respectively on the map. As a result access to secondary schools to the north and north west is limited by the river Thames which forms a natural boundary to the area. In addition, the admissions criteria for those schools on the other side of the river limits access by parents living near the planned location near the Free School. These geographical factors, combined with the growing increase in basic need/deficit of places and the existing oversubscription rates for some providers, mean that there is in effect minimal choice of secondary school for parents living in the preferred area for the new Free School.

In conclusion, there is a clear demand for an extra 138 secondary school places in 2019, rising to a need for over 200 places in 2022. From the location of the source of the demand and the individual circumstances of the five schools in the Borough of Elmbridge, it is evident that this increase in demand cannot be met within the existing establishments. In order to meet this need and offer genuine choice of provision, a 6 FE Free School, located in the north of the Borough, would be an ideal solution.

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

NB Engagement material attached as annexes, see page 64 onwards.

Engagement strategy

We recognise that successful engagement with all stakeholders, in particular the families of potential students of the new school, will be critical to the success of the Free School. In addition we acknowledge the need to engage with the wider educational community across the Borough and the local community in the preferred development location area. As stated in Section C1, we are mindful of the needs and aspirations of existing providers within the borough and we do not seek to disadvantage them in any way.

We are working with and will continue to work closely with Surrey Local Authority in respect of engagement with parents and the local community. We will use their extensive local knowledge, including the network of Nursery Schools, Local Primary Schools and community engagement activities to directly contact potential students within the preferred area of the proposed new school.

We have a two stage strategy:

- Pre bid submission: Initial engagement in the limited time prior to bid submission
- Post bid submission: more extensive, detailed engagement focused on all those registering their interest in stage 1, plus a wider community information dissemination to increase our reach.

Engagement reach

The key stakeholders we are engaging with is as follow

- Nursery schools
- Primary schools
- Secondary schools
- Post 16 providers
- Local parent groups
- Local residents
- Local community groups
- Local Government, including counsellors

E2 – successful engagement with parents and the local community

Our primary focus is on stakeholders situated within a 3 mile radius of the preferred school location, however, in terms of existing education providers we have extended engagement activities to cover the entire Borough of Elmbridge.

Proportion of community engaged

At the time of bid submission our known engagement levels are as follows:

Distribution of over 3,000 leaflets within the Primary School Community with a focus on Primary Schools within 2 miles of the indicative postcode. All pupils/parents within the maintained primary sector within this radius would have had the opportunity to access this material.

Over 750 direct mailshots to houses within 1 mile radius comprising 60% of postcodes within the area.

Post bid submission it is anticipated to increase the mailshot circulation to 60% of postcodes with 2 miles and provide leaflets to all maintained primary school pupils/parents within the Borough of Elmbridge.

Engagement methodology

Information meetings: Invitation: Separate information meetings for Heads and Chairs of Governors of all Borough Primary and Secondary schools, email information updates for each group.

Information events: Open access information events for all prospective parents and any other interested parties.

Public presentations: Information 'stand' and hand out in local shopping centres.

Press releases: Co-ordinated release using Surrey LA resources and expertise

Online presence: Dedicated website providing information. Links to on-line 'registration of interest/comment/feedback' facility. Dedicated enquiries email address. All who register will receive updates.

Status Updates: Email updates to all stakeholder groups listed above, including those registering interest via website.

Mailshots: Surface mail mailshots of promotional literature to local residents and all Primary and Nursery schools in the locality.

Promotional literature is attached as Annex 1. Screen shots of the dedicated website www.elmbridgefreeschool.co.uk are attached as Annex 2.

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)
[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]
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[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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[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]	[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED]	[REDACTED] [REDACTED] [REDACTED]

[Add lines as appropriate]

F1 (a) Skills and experience of your team

CVs attached as annexes, see page 64 onwards.

Pre-opening project management, overview

We believe that the ElmWey Learning Trust and its Free School core applicant group has access to individuals with strong relevant expertise in the two core areas (educational expertise and finance) and most of the six additional areas.

In addition through a realistic skills gap analysis, the Trust is aware of its key needs and is well placed to fill those gaps.

The sections below address the two core needs and each of the additional areas, identifying our current strengths, skills gaps and how these will be addressed. Individual personnel are identified against each of the core needs and additional six areas by their initials; personnel initials are listed in table 1a.

Core Need: Strong, relevant, educational expertise

Fully met within core applicant group by: ██████████. We believe that the combined skills and experience of the members of the pre-opening group provide a wealth of educational expertise more than sufficient to meet the planning needs for the new Free School. Specifically:

In the area of **School Improvement**, ██████████
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F1 (a) Skills and experience of your team

[Redacted text block containing multiple lines of blacked-out content]

Core Need: Financial expertise

Fully met within the core applicant group by: [Redacted]

[Redacted text block]

[Redacted text block]

[Redacted text block]

Additional area 1; School financial management

Fully met within core applicant group by: [Redacted]

F1 (a) Skills and experience of your team

[Redacted]

Additional area 2: Leadership:

Fully met within core applicant group by: [Redacted]

[Redacted]

[Redacted]

Additional area 3: Project management

Partially met within core applicant group by: [Redacted]

[Redacted]

[Redacted]

F1 (a) Skills and experience of your team

[Redacted]

Additional Area 4: Marketing

Partially met within core applicant group

The core group has limited experience of external marketing. This is in part due to the sustained over-subscription of Heathside School and hence the limited need for extensive marketing. We do have excellent in house graphic design and web development skills which can be used to support any marketing function.

We will address this gap by using third parties recommended by Surrey LA, the New Skills Network or, if at all possible, an existing, operational, Free School (see final section).

Additional area 5: Human resources

Fully met within core applicant group by: [Redacted]

Within ElmWey we have extensive experience of recruitment and HR at all levels. This stems from Heathside schools' history as a Grant Maintained and latterly Foundation school, which enabled it to operate its own HR support.

[Redacted]

Additional Area 6: Safeguarding, health and safety

Fully met within core applicant group by: [Redacted]

Safeguarding: [Redacted]

F1 (a) Skills and experience of your team

[REDACTED]

Health and Safety: [REDACTED]. ElmWey Learning Trust, through its operational responsibility for Heathside School, is fully cognisant of all H & S requirements and legislation regarding a school site. It meets all these requirements and is experienced in managing all aspects of inspection, testing, compliance and remediation work. Areas covered include electrical & gas safety, fire regulations, asbestos, legionella, COSHH, first aid and incident reporting, site security and safeguarding students and staff in off-site activities. The Trust's H & S policy and Risk Assessments will be applied to the new Free School. As for Heathside school, external consultancy support will be used as appropriate including CLEAPPS, EVOLVE trip management software and radiation protection advisor compliance.

Skills Gap Summary

As show in table 1b we identify two areas of skills shortage, marketing and project management. We will address these by networking through our governors, our strong links with existing local industries and businesses, the New Schools Network, Surrey LA and an existing, open Free School. We recognise that we may need to contract external consultants in this respect.

Principal Designate

[REDACTED]

Collaboration with other Academy/Free School

We recognise that the next stages in developing this proposal should involve drawing on the experience of an open and successful Free School. We will proactively seek a Free School partner which has the same age range, similar intake profile of pupils and educational aspirations. We already have links with two other Free Schools within the South East and at the time of bid submission are still identifying our preferred partner. We would seek to sustain a mutual partnership through the first 5 years of growth and the first Ofsted inspection

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
Marketing	Pre-opening team	Source recommended educational marketing expert. Seek recommendations from operational Free Schools, Governors' network, NSN, Surrey LA Timing: ongoing following bid submission.
Project Management	Pre-opening team	Source recommended Project management expertise. Seek recommendations from operational Free Schools, Governors' network, NSN, Surrey LA. Timing: ongoing following bid submission.
Link with Existing Free School	Pre-opening team, Trustees	Pursue potential link free schools using local knowledge and NSN. Timing: underway at time of bid submission; contacts established with some Free Schools.

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

Background and Context

This bid is being submitted by the ElmWey learning Trust (ELT), an existing MAT operating one secondary school, Heathside School. MAT and LGB structures, operational procedures and schemes of delegation are in place and functioning. These notes describe existing structures and their extension to provide governance for the new Free School.

Structure, Governance and Management (diagram on next page)

ELT is a company limited by guarantee and an exempt charity. ELT's memorandum and articles of association are the primary governing document of the Trust. The Trustees of ELT are also the directors of the charitable company for the purposes of company law. Members and Trustees are listed as required in section A of this bid.

Roles and Responsibilities

Members

Members appoint and remove Trustees in accordance with the articles. In the event that the charitable company is wound up each member has undertaken to contribute to the assets of the company such amount as may be required not exceeding ■■■■, for the debts and liabilities contracted before they ceased to be a member. The current members of ELT have served since incorporation of the charitable company.

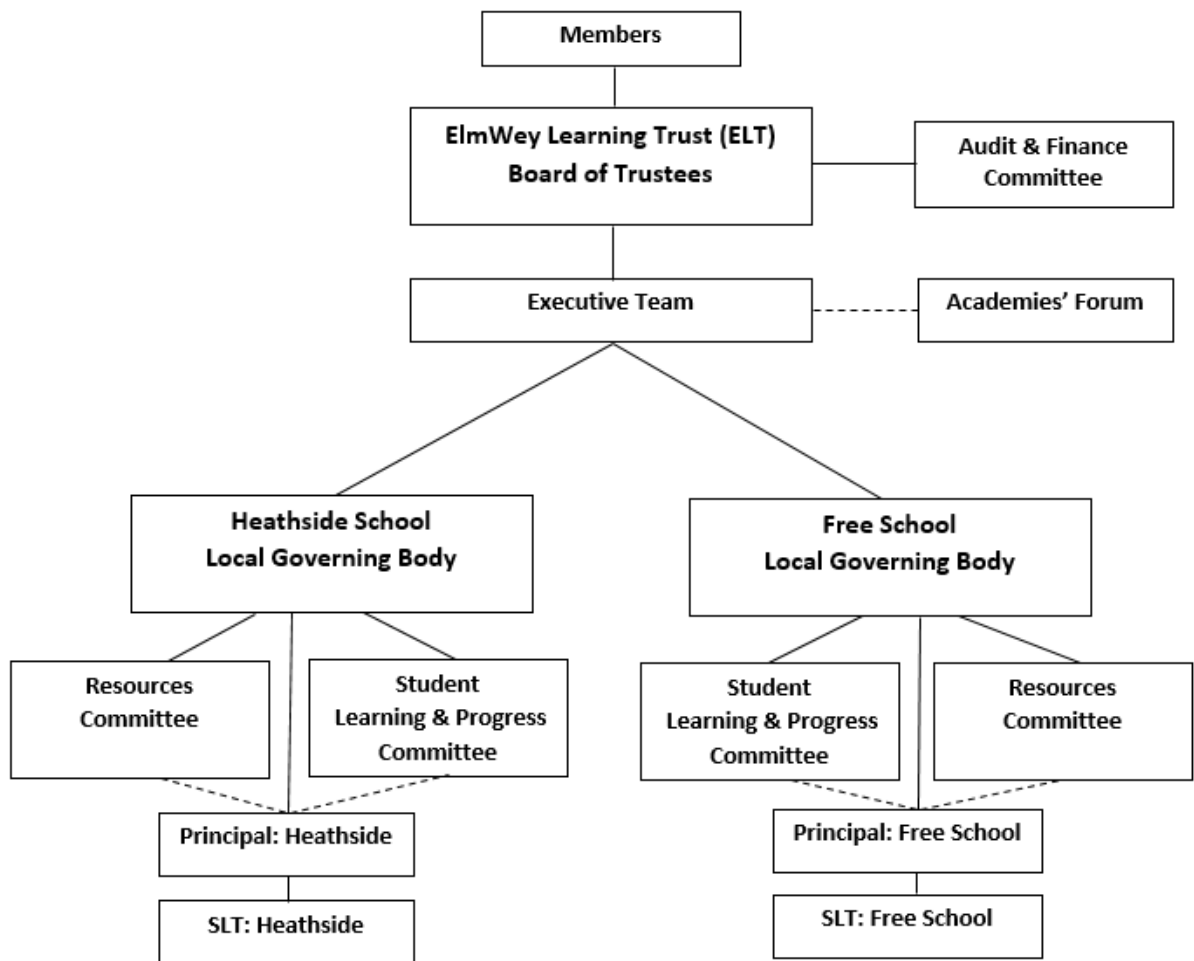
Board of Trustees

The Board of Trustees have served since the incorporation of the charitable company. The Board sets the strategic vision and establishes objectives for the Trust. It oversees the work of the LGBs by ensuring challenging and measurable key performance indicators are set for each academy. The Board has ultimate responsibility for the strategic direction of the Trust and its overarching policies. The Board approves Trust and individual academy budget plans, benchmarks spending and ensures compliance

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

with statutory requirements. Should the performance of an individual academy require improvement, prompt and appropriate interventions will be implemented by the Board on advice of the Executive Principal. Trustees are also responsible for trust-wide policies and for changes to admissions arrangements for any academy within the Trust. The Board of Trustees is supported by the Executive Principal, the Trust Improvement Partner, Chief Financial Officer and the Clerk to the Board.

Governance Structure Diagram: ElmWey Learning Trust and its Academies



Notes:

- Diagram shows structure of the Trust operational with two schools.
- The LGB structure for the Free School is shown for the school at full capacity, in the development stages the LGB will be compliant but may have fewer governors than the Heathside structure it mirrors.
- The Academies' Forum will be set up when further schools join the Trust (see below)

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

Executive Team

The Executive Team will comprise:

- Executive Principal
- Academy Principal – Heathside
- Academy Principal – Elmbridge Free School
- Quality Assurance Lead
- Chief Financial Officer & Company Secretary
- Finance Manager/Trust Accountant

The Executive Team form the operational leadership of the Trust, contributing to and informing strategic decisions ensuring best value is achieved, not only through effective procurement but also by identifying collaborative working and supporting the developmental needs of each Academy in the Trust.

The Executive Principal is the Accounting Officer. The Trust has set finance and accounting policies which include a financial scheme of delegation and set authorisation levels for academies, LGBs and the Board. Within the delegated limits some financial authority is devolved to appointed budget holders to a prescribed limit, above which the Academy Principal or the School Business Manager, is required to give approval.

Local Governing Bodies

Responsibility is delegated from the Board to each LGB for oversight of its academy by means of terms of reference and a scheme of delegation. These set the responsibilities of the Board, LGB, Executive Principal and Academy Principals.

The LGB will set and review an Academy Development Plan (ADP) and monitor its performance against the KPIs set by the Trust and the objectives of the ADP. The Academy Annual Budget plan will be set by the LGB for approval by the Board.

There is a minimum of two committees for each LGB, the Student Learning and Progress Committee and the Resources Committee.

The LGB and its committees will challenge and support the SLT in each Academy through regular monitoring to ensure best value in terms of students' outcomes and financial monitoring. The LGB and committees will meet at least 3 times each year.

Each LGB is supported by an academy Senior Leadership Team (SLT) led by the academy Principal and including the academy's Business Manager, as well as a clerk to the LGB. The SLT implements the Academy Development Plan and policies and provides leadership and management for each school's community. It develops the quality of

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

teaching, the curriculum, staffing model, the provision of high quality professional development for all academy staff and the learning environment for all students.

Academies' Forum

When the Trust expands beyond two schools, we intend to set up an Academies' Forum to provide a communication route for all schools both to and from the Board. Not all schools may have direct representation on the Board; the Forum will facilitate sharing of views and information between schools and promote open, Trust-wide communication.

Securing Challenge and Minimising Conflicts

Both external and internal auditors have been appointed by the Board of the ElmWey Learning Trust. An audit and finance committee has been established, with terms of reference which ensure compliance with its articles, Funding Agreement and the Academies Financial Handbook.

In addition trustees have ensured buyback arrangements exist to ensure independent, professional advice is available to trustees and staff with key financial responsibilities, including the Accounting Officer, Chief Financial Officer and the Trust Finance Manager. These arrangements cover legal, accountancy, audit, financial and governance consultancy.

Trustees ensure a range of accounting policies are in place including a Finance Policy to ensure that conflicts of interest do not arise. Currently no member, trustee, their relatives or any connected business organisations supply goods or services to the Trust. Members and Trustees are required to declare any business and pecuniary interests which are published on the Trust's website. Declaration of interests is included on the agendas of all meetings. If goods or services were to be provided by a connected party, trustees and employees with key financial responsibility are aware of the 'at cost' principles and this is set out in the Trust's Finance Policy.

Trustees have undertaken the Financial Management and Governance self-assessment and have a Risk Register in place which will be regularly reviewed by both the Audit and Finance Committee and the Board and will be used to instruct the programme for internal audit. The Trust is a member of the DfE Risk Protection Arrangement which provides indemnity to Trustees and Employees of the Trust.

Recruitment Planning

The systems currently in place to recruit against governance positions at ElmWey Learning Trust and Heathside School LGB are outlined below; these processes will be

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

extended to recruit suitably qualified individuals to provide governance at the new Free School.

Trustees

Each year the trustees complete a pro forma outlining their skills, experience and interests. This informs an evaluation of the mix of skills available to the Board. New trustees are recruited to fill any gaps in the portfolio of skills available to the Board, either as additional trustees or replacements when existing trustees stand down. Where necessary, other trustees are appointed after consulting local community groups and businesses or the School Governor One Stop Shop (SGOSS) or the Academy Ambassador Programme.

Local Governors

A similar approach is used by the LGB. Local governors also complete a skills and experience pro forma so that the portfolio of available skills can be evaluated annually. Again co-opted vacancies can be filled by consulting with local community groups and businesses and using the SGOSS. To assist with recruiting the inaugural LGB for the Free School, the Trust will exploit its well established links with some of the largest organisations and employers serving the local community, which have a proven record of providing governors to schools in the local area. Companies and organisations with which ElmWey has well established links include for example, BP, Sony, Unilever, Glaxo Smith Kline, Procter and Gamble and Royal Holloway University of London.

Nominations are invited where staff or parent/carers governor vacancies exist and where there are more nominations than the number of vacancies, elections will take place to effect appointments. The Board of Trustees must approve the appointment of Chairs to the LGBs. We believe that our proactive approach to parental engagement at the new Free School, coupled with our experience at Heathside, where there has never been a shortage of applicants for the post of Parent Governor, will lead to a very strong parent/carers governor presence.

Executive Team

The trustees are responsible for the appointment of the Executive Principal, Academy Principals and the Chief Financial Officer in accordance with the Trust Recruitment Policy. For the Academy Principal posts, local governors will also form part of the recruitment panel. The Executive Principal will be responsible for the recruitment of other Trust posts.

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

Academy Leadership and Middle Management

The relevant LGB, Executive Principal and Academy Principal are responsible for the recruitment of all other senior leadership posts. The Academy Principal is responsible for the recruitment of staff to middle management posts.

Induction and Training of Trustees and Governors

New Trustees will be invited to meet with the Executive Principal, the Chair of the Board and the Executive Team. Both new Trustees and Local Governors will be provided with an induction pack and training. Training will be provided by an external specialist in governor training. Local governors will meet the Academy Principal and have an induction tour of the Academy.

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

N/A

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
N/A

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
N/A

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

Additional Information

This bid is being submitted by the ElmWey Learning Trust, under which Heathside School is an 'open state funded school'. Whilst this removes the requirement to submit full financial information, the additional information provided below is given so as to demonstrate the School and Trust's proven track record of sound, prudent financial management.

Heathside's Revenue Surplus Balances (combined committed and uncommitted) have increased year-on-year since 2010 from ██████████ per student. This has not been to the detriment of current students as is evidenced by the sum transferred from revenue to fund capital projects at the school. This sum rose from ██████████ in 2012 increasing to ██████████ in 2015, totalling ██████████ in the period, prior to Academy conversion (April 2012 to August 2015). This has ensured investment in the premises and ICT provision at the school to meet the objectives of the School Development Plan.

The surplus balance has been generated owing to financial controls and prudent spending decisions. In 2014/2015 Heathside received grant funding of ██████████ per pupil, well below both the national median of ██████████ per student and the Surrey median of ██████████. Of the 23 Surrey maintained secondaries in 2014/2015 Heathside was amongst the 7 lowest funded.

Staffing is well managed with total teaching staff spend per pupil at ██████████ in 2014/2015, this is well below the LA and National medians of ██████████ respectively and is

G1 – budget planning and affordability

fifth lowest out of 23 Surrey maintained secondaries. This has been achieved whilst still maintaining a healthy (above average) pupil to teacher ratio of 17.4 and a realistic average gross salary, within the context of sixth form provision, location and living costs. Staffing costs are driven by efficient staff utilisation and curriculum and timetable planning.

To ensure ongoing prudent decision making and affordable spending, Trustees regularly review short and long term financial forecasts and regularly consider benchmarking data. Data sources used in this way include: DfE sources (e.g. CFR and Performance Tables), Academies Financial Benchmarking and Accountants' Academies' Benchmarking Reports (e.g. James Cowper Kreston).

Upon conversion to Academy status, Heathside opted to use PS Financials Accounting system which is used by many MATs. Functionality has been put in place to produce consolidated accounts in readiness for new schools joining ElmWey Learning Trust. A central purchasing system and financial systems and procedures are being developed to ensure compliance with procurement requirements and to secure best value across the Trust.

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.

Elmbridge Free School Bid Annexes

The following annexes follow below in support of this bid:

- **D3 Staffing organograms**
- **E1 Evidence of need**
- **E2 Engagement with parents and local community**
- **F1 CVs**
- **H Preferred site plan**



Department
for Education

Free school application form

Elmbridge Free School

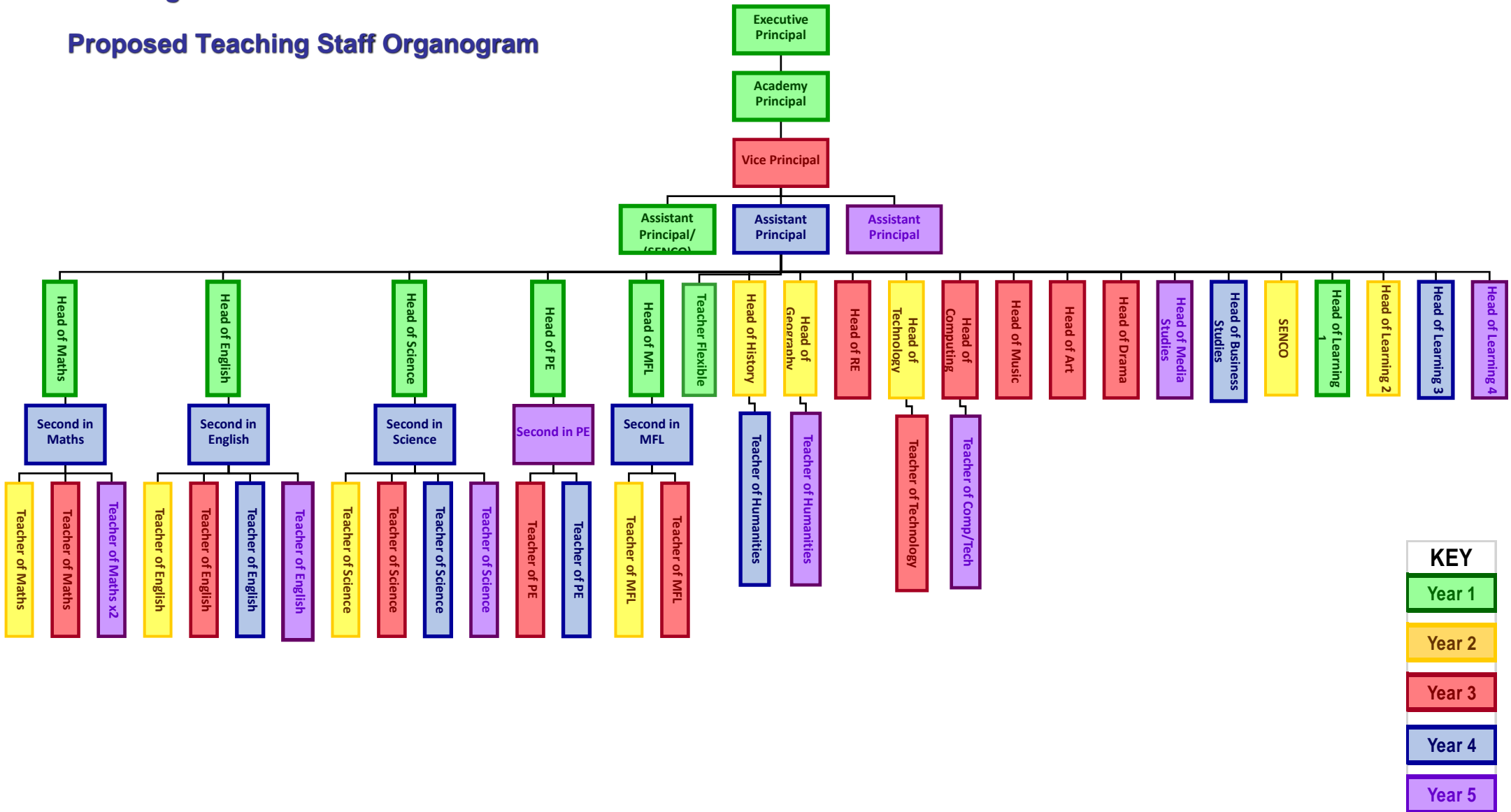
Section D3 Annex: Staffing Organogram

Teaching staff

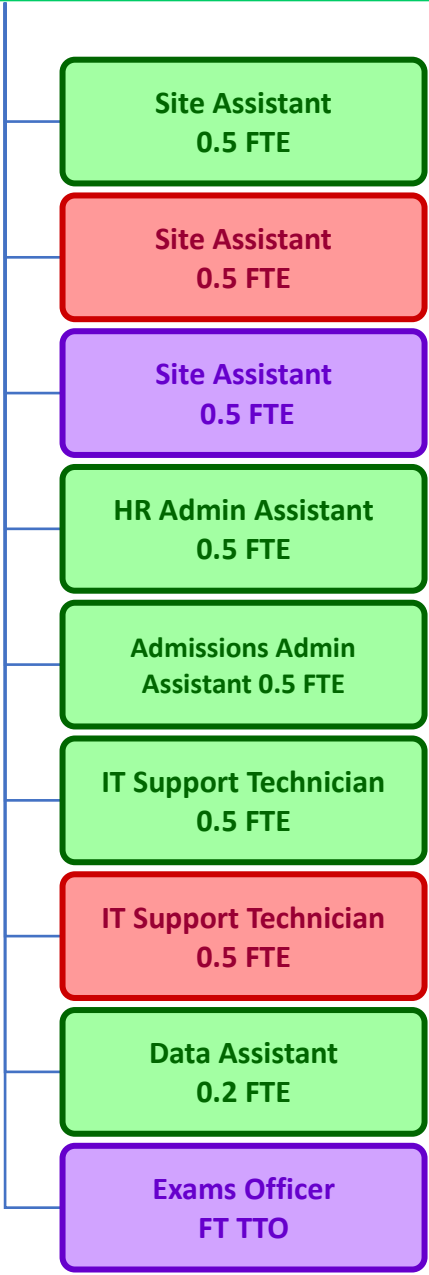
Support staff

Elmbridge Free School

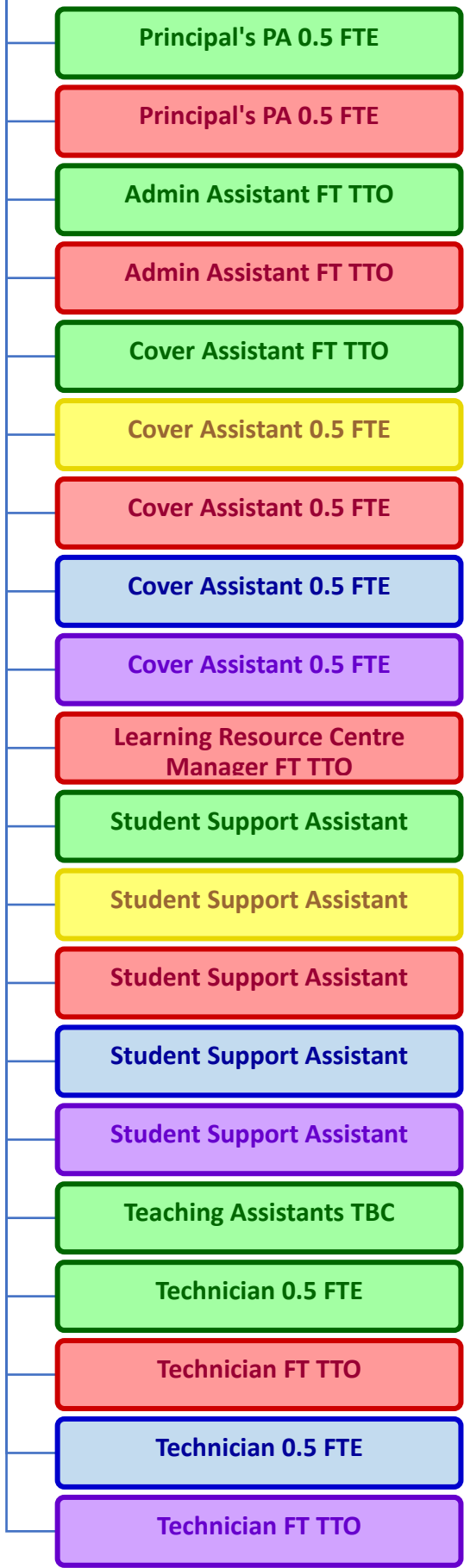
Proposed Teaching Staff Organogram



ElmWey Learning Trust



Elmbridge Free School



**Elmbridge Free School
Proposed Support Staff Organogram**





Department
for Education

Free school application form

Elmbridge Free School

Section E1 Annexes

Annex 1: Location map

Annex 2: Local provision performance measures

Annex 3: Basic need/demand table

Annex 4: Live birth data

Annex 5: Spot maps, eligible students

Annex 6: Preferences; existing schools

Annex 1 Elmbridge Secondary Schools: location map

Data provided by Schools Commissioning Office, Surrey LA

- Coloured circles are centred on proposed site and at 1 mile intervals
- X and Y are River Thames crossing points

 Preferred Location of Free School



Annex 2 Local Provision Performance Data

Data sourced from current DfE league tables

Provider	Latest Ofsted Grade	GCSEs 2015 % 5 A*-C inc En & Ma	EBacc 2015 % Pass	Expected Progress En 2015	Expected Progress Ma 2015
Esher Church of England High School	Good	50%	32%	58%	63%
Rydens Enterprise School	Requires Improvement	38%	23%	72%	51%
Hinchley Wood School	Outstanding	79%	52%	82%	90%
Heathside School	Good	78%	44%	80%	80%

Annex 3 Elmbridge Secondary Places: Basic Need predictions, existing capacities and shortfall

Data provided by Schools Commissioning Office, Surrey LA

	2016 PAN	2017 PAN	2018 PAN	2019 PAN	2020 PAN	2021 PAN	2022 PAN	2023 PAN	2024 PAN
Heathside	210	210	210	210	210	210	210	210	210
Hinchley Wood	210	210	210	210	210	210	210	210	210
Esher High	240	240	240	240	240	240	240	240	240
RES*	240	270	300	300	300	300	300	300	300
CFS	72	96	96	96	96	96	96	96	96
combined area PAN: Existing Schools	972	1026	1056	1056	1056	1056	1056	1056	1056
Forecast demand	977	994	1072	1194	1175	1226	1271	1262	1192
Deficit	-5	-32	-16	-138	-119	-170	-215	-206	-136
new Free School PAN	0	0	0	150	150	180	180	180	180

RES* NB PAN rises to 300 from September 2018 following site redevelopment.

Annex 4 Elmbridge: Live births by academic year

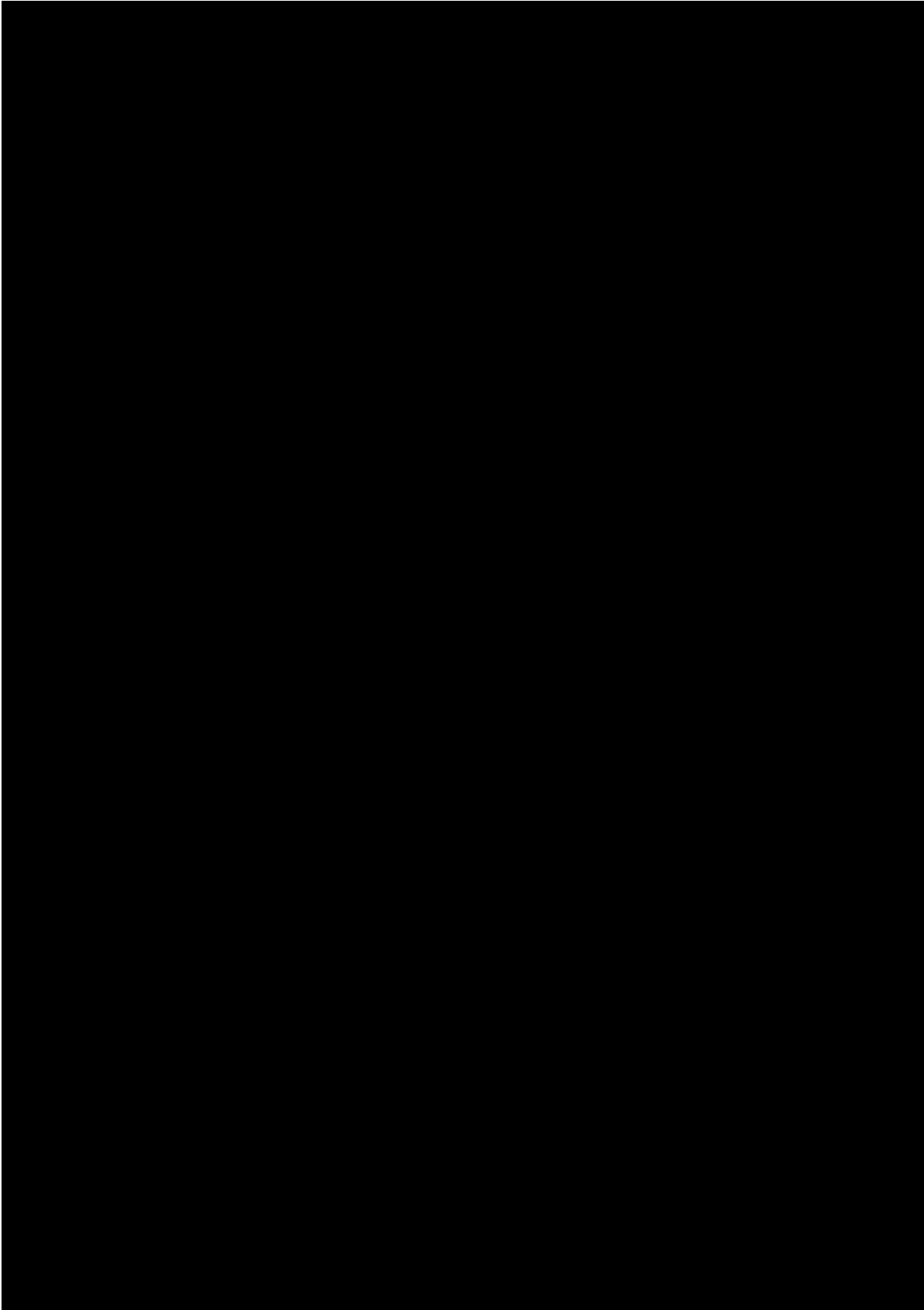
Data provided by Schools commissioning office, Surrey LA

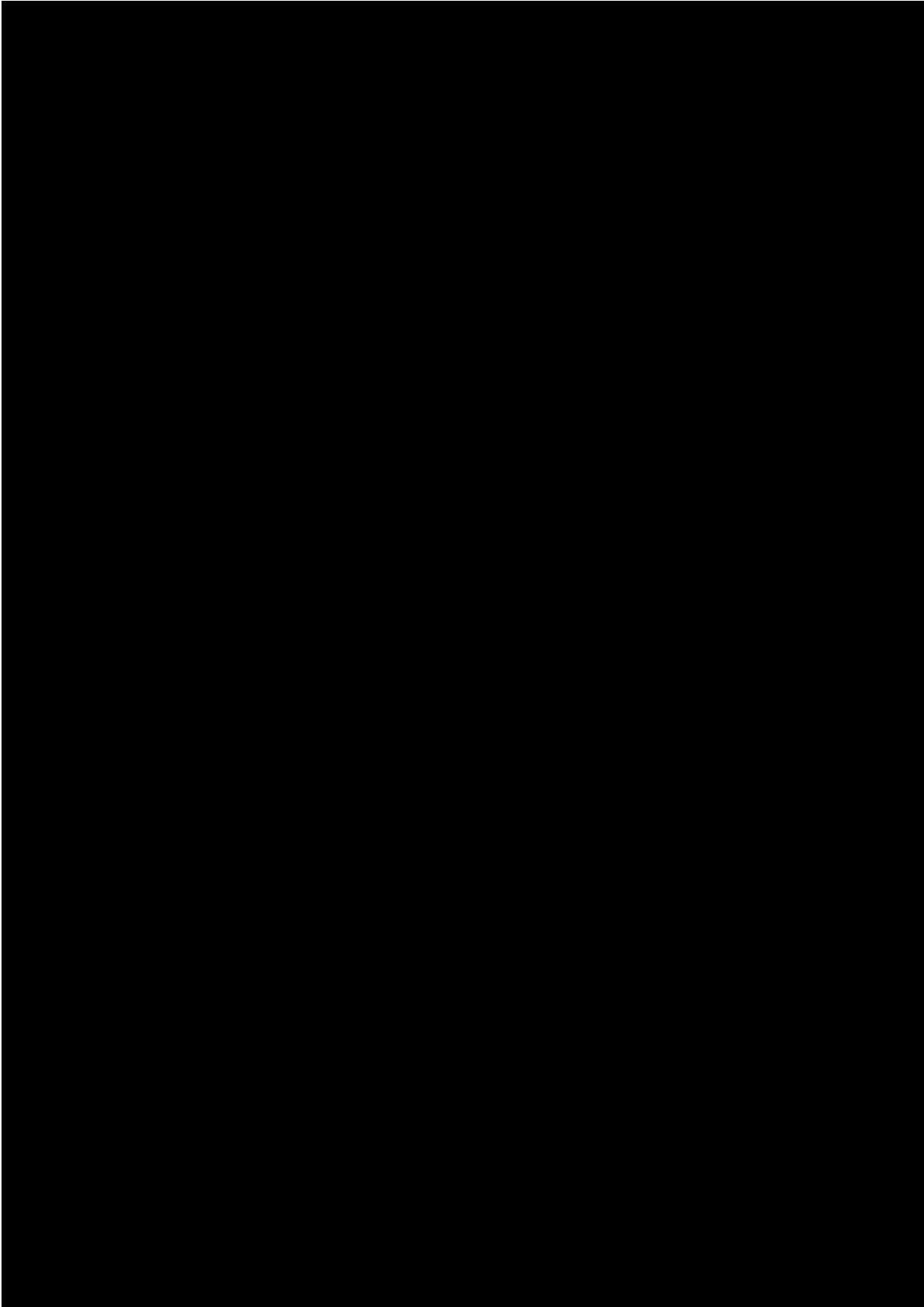
2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
1698	1759	1780	1768	1847	1883	1843	1841	1806

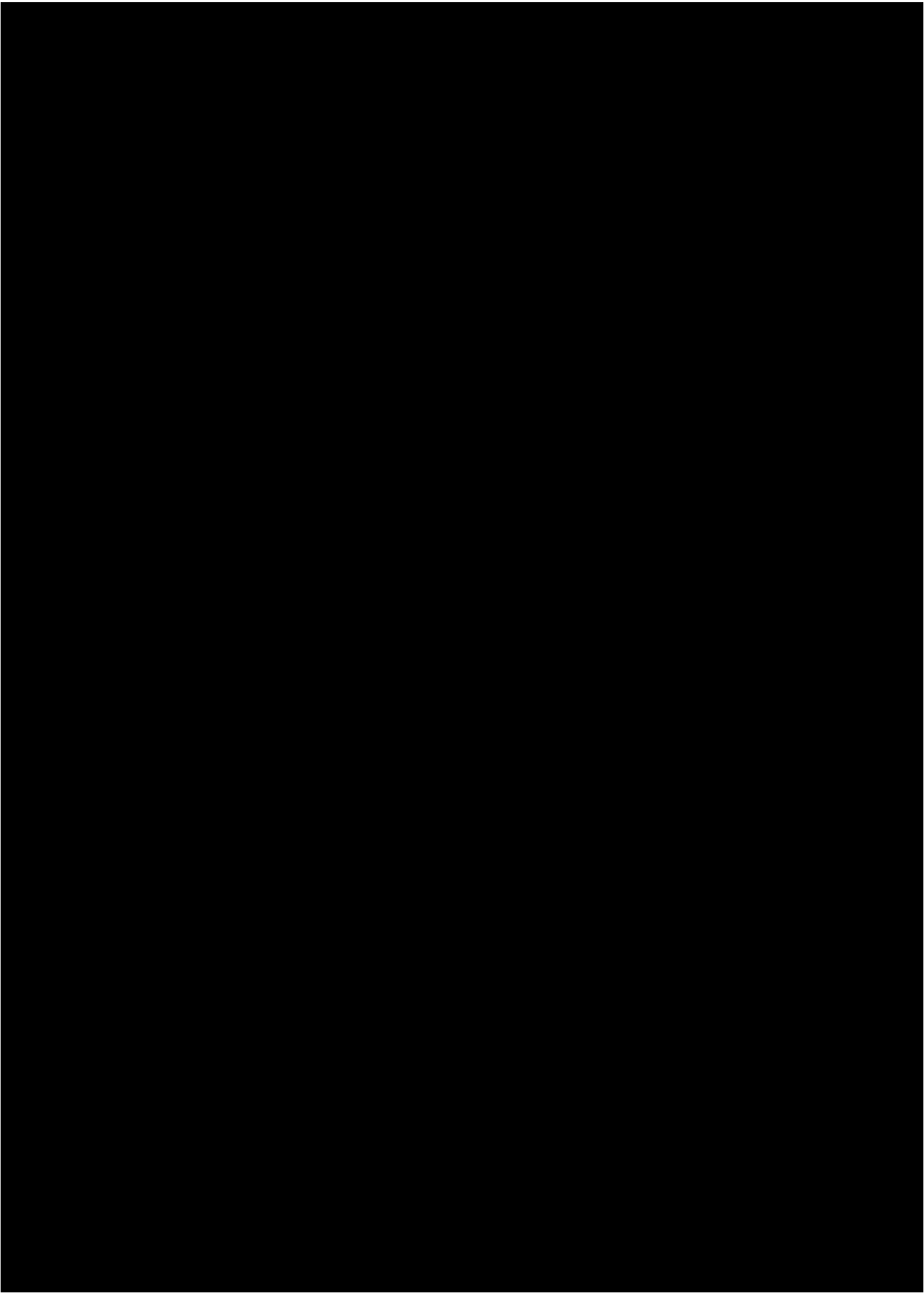
Annex 5 (following pages) Elmbridge: Spot maps of home addresses of students eligible for Year 7 in academic years:

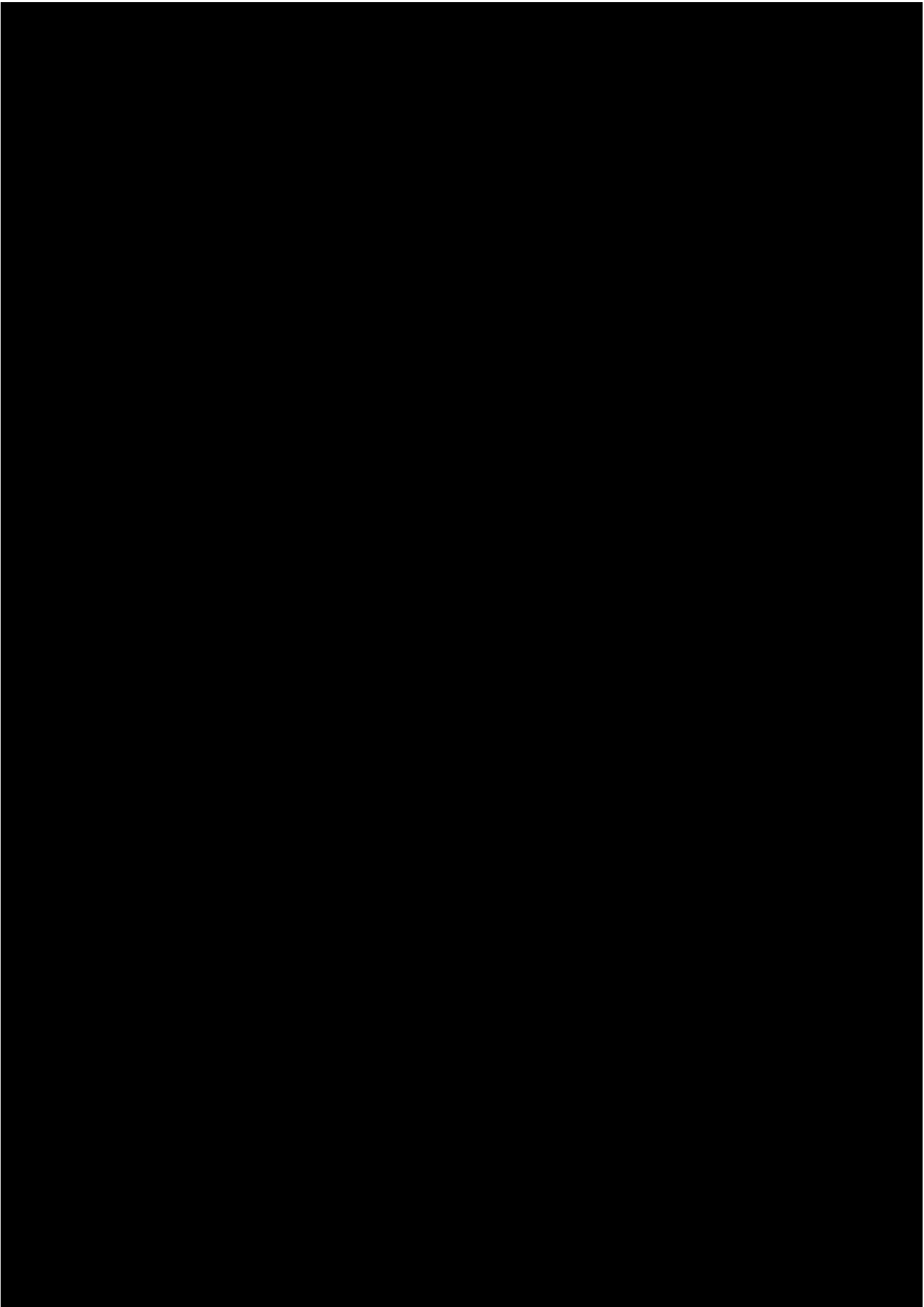
- **2018**
- **2019**
- **2020**
- **2021**

Data provided by Schools commissioning office, Surrey LA









Annex 6 Elmbridge: Secondary Schools Parental Preferences, 2015 admissions round

Data provided by Schools commissioning office, Surrey LA

School	2015 PAN	Total on time 1st preferences	In county	Out of county	2nd preferences	3rd preferences
Heathside	210	283	283	0	188	162
Esher High	240	235	233	2	289	105
RES	210	150	150	0	90	58
Hinchley Wood	210	305	258	47	203	111
CFS	72	60	59	1	84	68



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Section E2 Annexes: Promotional Literature

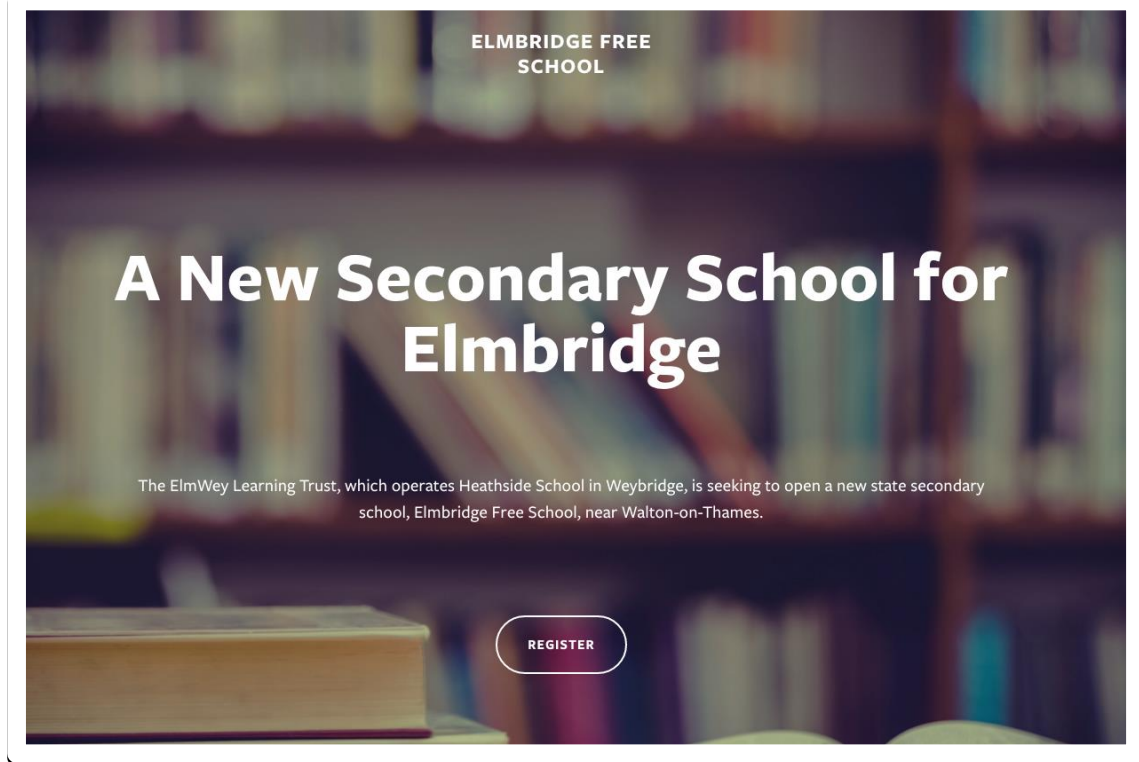
Website

Flyer

One page information sheet

Elmbridge Free School Website: sample pages

www.elmbridgefreeschool.co.uk



Website Intro

ELMBRIDGE FREE SCHOOL

Elmbridge Free School will be an outstanding, non-selective, mixed, 11-16 secondary school meeting a clear demand for secondary places in the Borough of Elmbridge, Surrey. It will provide educational outcomes that meet the aspirations of both parents and students and enable students to progress to further and higher education and expand their career opportunities.

On this website you'll find more information on what Free Schools are, the ElmWey Learning Trust, why we are making the bid and most importantly what Elmbridge Free School will be like and how it will serve the community and young people of Elmbridge. Click the menu on the top left or click here for the FAQ

Summary Message

Why is a new school needed?

There is a growing need for secondary school places in Elmbridge. Surrey Local Authority predict that by September 2019 there will be a shortage of 138 secondary school places, rising to 215 by 2022. In addition a new school will give parents a greater choice of secondary education and the high standards we seek to achieve will improve the quality of provision within the borough.

What will the school be like?

Elmbridge Free School will be a new, mixed, 11-16, non-faith based, non-selective secondary school. It will admit 150 pupils per year in its first two years of operation rising to 180 pupils per year.

What is our vision for Elmbridge Free School?

Our vision is simple, straightforward and based on an ethos of core values and standards. It is to create a school where academic progress and attainment are outstanding for all students, enabling them to access employment, further and higher education without restriction. Our vision is that all members of the school community will respect these aspirations and feel safe, secure and supported in working towards them. We want our students to feel proud to attend our school and proud of their achievements when they progress to their next career and life steps.

FAQ Section 1

What are Free Schools?

Free Schools are State funded schools. The first were set up in 2011 and there are now over 300 across the country including over 120 secondary Free Schools. They are not under the control of the Local Authority and are funded directly by the Department for Education.

Who is making the Bid?

The bid is being made by The ElmWey Learning Trust. ElmWey currently operates Heathside School in Weybridge. Heathside is a very successful, mixed, 11-18 secondary school. ElmWey is seeking to replicate the educational ethos, standards and achievement of Heathside at Elmbridge Free School. Surrey Local Authority is supporting ElmWey in this bid. ElmWey will use the strengths and experience of Heathside School to help establish Elmbridge Free School.

Where will the school be?

We hope the school will be built between Walton-on-Thames and Molesey, so as to serve the needs of local families and the growing demand for high quality secondary education in that area.

When will the school open?

Our bid is to open to the first intake of 150 Year 7 students in September 2019. These will be students who are currently in year 3.

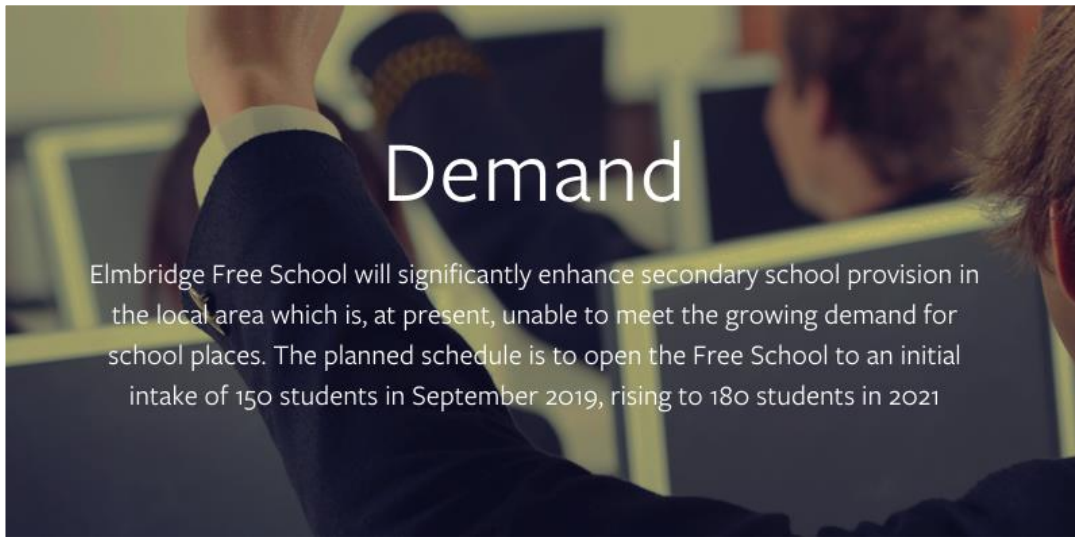
FAQ Section 2

How will admissions work for the new school?

The school will be non-selective. Precise admissions criteria will be agreed as our plans are developed further and when the school site is finalised.

Where can I get more information?

Please register your interest via our website and we will email you updates. This website has further information and links to ElmWey Learning Trust and Heathside School so that you can see what we plan.



Demand

Elmbridge Free School will significantly enhance secondary school provision in the local area which is, at present, unable to meet the growing demand for school places. The planned schedule is to open the Free School to an initial intake of 150 students in September 2019, rising to 180 students in 2021

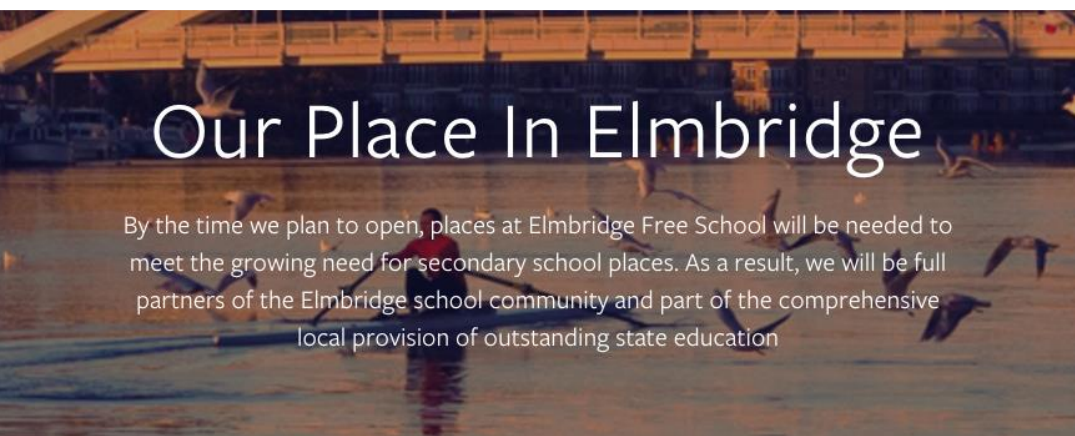
Demand for school places



Outstanding

Our close links with Heathside School will enable us to draw on the skills, expertise and experience which are well established at that very successful school

Links to Heathside



Our Place In Elmbridge

By the time we plan to open, places at Elmbridge Free School will be needed to meet the growing need for secondary school places. As a result, we will be full partners of the Elmbridge school community and part of the comprehensive local provision of outstanding state education

Flyer Text: Used in local mailshots and promotional literature

+

What is our vision for the school?

Our vision is simple, straightforward and based on an ethos of core values and standards. It is to create a school where academic progress and attainment are outstanding for all students, enabling them to access employment, further and higher education without restriction. Our vision is that all members of the school community will respect these aspirations and feel safe, secure and supported in working towards them. We want our students to feel proud to attend our school and proud of their achievements when they progress to their next career and life steps.

Enrichment

In addition to academic study we believe that an outstanding school should enrich students' lives by providing access to areas such as creative arts, music and sport. As a growing school we will work with Heathside School and other bodies to ensure our students access an exemplary range of opportunities.



A New Secondary School for Elmbridge


The ElmWey Learning Trust, which operates Heathside School in Weybridge, is seeking to open a new state secondary school, near Walton-on-Thames in Elmbridge.





ELMBRIDGE

FREE SCHOOL



Why is a new school needed?

There is a growing need for secondary school places in Elmbridge. Surrey Local Authority predict that by September 2019 there will be a shortage of 138 secondary school places, rising to 215 by 2022. In addition, a new school will give parents a greater choice of secondary education and the high standards we seek to achieve at Elmbridge Free School will improve the quality of provision within the borough.

What will the school be like?

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Admissions

The school will be non-selective. Precise admissions criteria will be agreed as our plans are developed further and when the school site is finalised.

The Curriculum

The group of subjects our students study will be closely based on the most recent National Curriculum. We believe that this curriculum, which has strong foundations in both English and Mathematics but has breadth and balance to meet the interests of all students, is best suited to enhance the career chances and opportunities for young people. We will enhance the core curriculum by ensuring:

- Academic stretch and challenge for the most able.
- Additional support for any and all who would benefit.

Our curriculum will aim to maximise academic success for all and reflect and meet the needs of all students who enrol.

The ElmWey Learning Trust is applying to the DfE to set up a new 11-16 Free School in Elmbridge.

Why is a new school needed?

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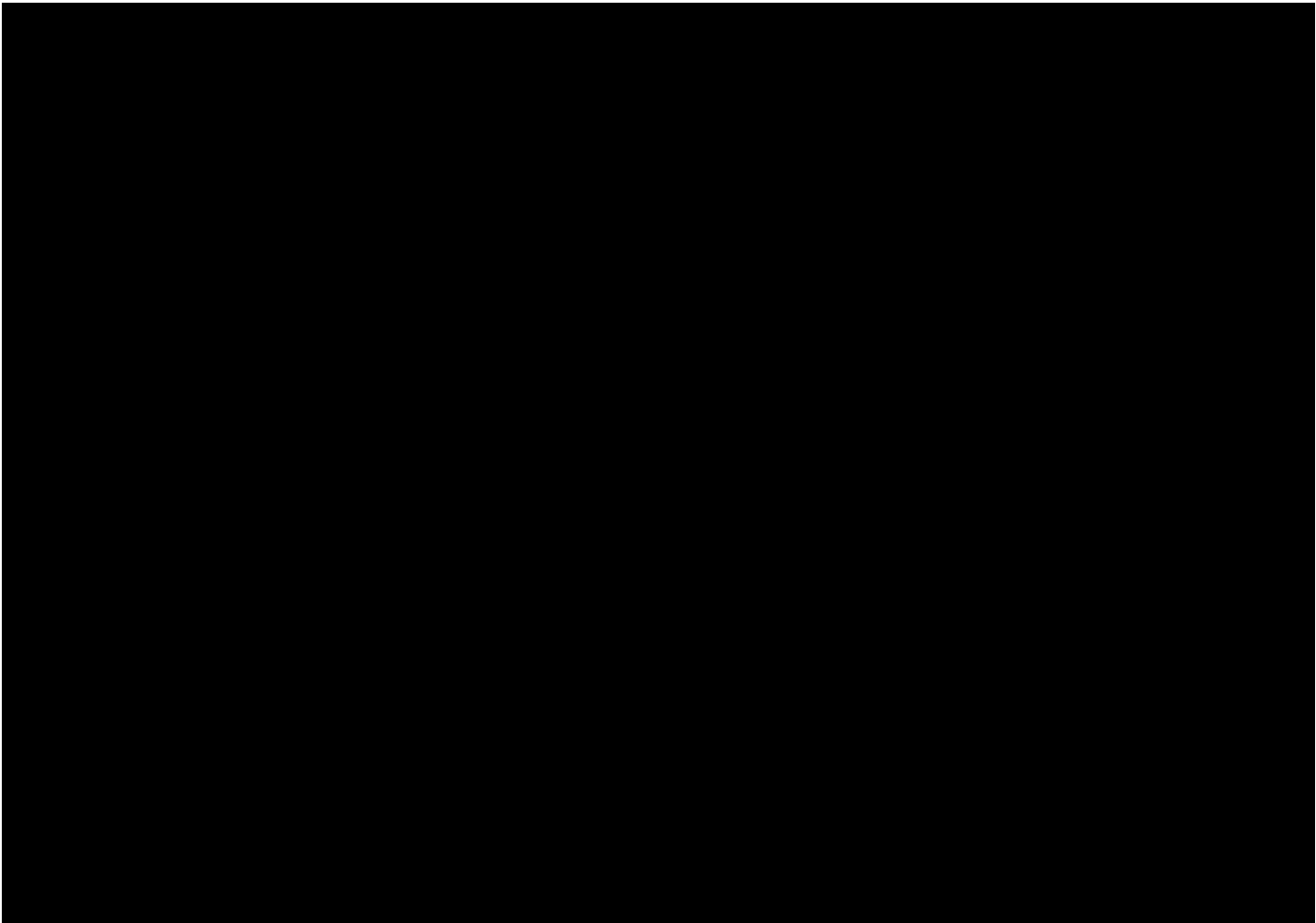
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Elmbridge Free School

Section H Annex

Site plan: preferred site



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.</p> <p>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.</p> <p>Consistency of student presentation of work and scrutiny reference progress and standards</p> <p>How marking, assessment and students feedback/reflection enhances pupil learning</p> <p>Teaching strategies including setting of appropriate homework, together with a review of support and intervention strategies to match pupil needs</p> <p>How teaching promotes pupils learning and progression</p> <p>The review should be validated externally to ensure moderated outcomes for the school</p> <p>Reading, writing, communication and mathematics across the curriculum.</p> <p>Tutor and pastoral time including SMSC and British values</p> <p>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</p> <p>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 		



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