



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

**SANDCROSS ALEXANDER**



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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](mailto: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](mailto: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](mailto: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)?		
<b>Section A:</b> Applicant details	✓	
<b>Section B:</b> Outline of the school	✓	
<b>Section C:</b> Education vision	✓	
<b>Section D:</b> Education plan	✓	
<b>Section E:</b> Evidence of need	✓	
<b>Section F:</b> Capacity and capability	✓	
<b>Section G:</b> Budget planning and affordability	✓	
<b>Section H:</b> 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. <b>Independent schools only*</b> : Have you provided a copy of the last two years' audited financial statements or equivalent?	N/A	



7. <b>Independent schools only*</b> : 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. <b>Independent schools only*</b> : Have you provided the documents set out in the criteria document specifically around your current site?	N/A	
9. <b>Re-applications only</b> : 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: <b>Free School Application - School Name: [insert]</b> with all relevant information relating to Sections A to H of your application to: <a href="mailto:FS.applications@education.gsi.gov.uk">FS.applications@education.gsi.gov.uk</a> before the advertised deadline?	✓	
11. <b>Studio schools only</b> : Have you emailed a copy of your application to the Studio Schools Trust at: <a href="mailto:applications@studioschooltrust.org">applications@studioschooltrust.org</a> ?	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 <sup>rd</sup> 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"> <li>• a copy of Section A (tab 1 of the Excel template); and</li> <li>• 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</li> <li>• a list of those lead applicants, members, directors, and principals designate who have submitted Section I forms within the past 365 days</li> </ul> <p>by emailing scanned copies of Section I forms to <a href="mailto:due.diligence@education.gsi.gov.uk">due.diligence@education.gsi.gov.uk</a> 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:** [REDACTED] (please delete as appropriate)

**Print name:** [REDACTED]

**Date:** 1<sup>st</sup> March 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 C1 – a credible proposal to deliver a high-quality free school and a clear rationale for establishing it in this area**

**Outcomes for children are excellent.** Teachers work exceptionally hard to secure high standards and senior and middle leadership is strongly focused on success for every pupil. Our children are smart, hard-working and polite from Nursery to Yr 6. They come to school every day wanting to be 'green' for learning, effort and attitude and almost all of them succeed in this goal. Regular 1:1 feedback ensures that they achieve the desired goals and leave us as confident, articulate, literate, numerate young people who have the tools to cope with changes and challenges of all kinds. The atmosphere is calm and happy and relationships with parents, carers and the wider community are excellent. We believe we can build on this firm foundation in starting a Free School.

**Our three year attainment trend is well above the national average** and is particularly high at KS1 Level 2+. Our value added is strong – far better in reality than it appears on Raise Online. For example, at KS1 we have a group of children who did not access EYFS education at all, but we are still aiming to try and secure age level expectations for them by the end of Year 2 and their progress has been excellent, even though their attendance is still an issue we are tackling.

At KS2, we had six children who joined in Yr 3 with no KS1 data (in some cases no KS1 schooling) but made outstanding progress over four years and reached or exceeded the expected standards by the end of Yr 6. These children are not counted in the value added on Raise Online. The cohort was one of the most complex we've ever had, with 53 out of the 120 children having additional needs, yet we reached 90% age expected in Writing for the first time – a constant upward trajectory over five years. At the same time attainment in Maths dipped unexpectedly as some of our vulnerable children froze on the day. This hasn't happened before but we have modified approaches every since and expect better results this year. A large group of targeted Yr 6 children are coming in early for practical Maths activities every morning and are improving fast.

**We are relentless in our aspirations** and the actions we take to secure success for every child. We are also very good at challenging children who are ready for more – it's part of the school ethos to remove 'ceilings' on learning and inspire bright young minds. Please note that every child in the school is on the register of Gifts, Talents, Interests and Aptitudes for a specific reason, as our mission statement is 'Finding Excellence in Everyone' and we are constantly doing exactly that. We have averaged 12% Level 6 for Maths over the past three years. Children are also recognized for their skills in the Arts, Sport and leadership skills as well as their passionate interest in subjects like Science, IT or History. We are also way ahead of any other school we've worked with on assessment without levels, trialling assessment 'Passports' this year, designed by our Deputy Head for every year group.

**Our proposal** is to open a high quality Free School in a currently empty school building about half a mile away from here. This school would be set up using well-established Sandcross values, policies, assessment systems and curriculum – all of which have been developed and embedded successfully over the last six years. The building would cater for two classes per year group in Yr R, Yr 1 and Yr 2. At Yr 3 we already have provision to accept all the children into the existing Sandcross Primary School, just half a mile away.

**There is also a space for a Nursery**, which we propose to run ourselves offering full day provision.

There is a spare classroom which is a real asset in terms of additional provision for children and for workshops with parents and multi-agency meetings, of which there are

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

many at Sandcross. We anticipate that the context will not change and we will continue to need this level of support in the Free School.

Child Care is an issue in the local community and we have exceeded the capacity of Sandcross Primary School to meet needs – our current provision is Ofsted rated ‘Good’ and is oversubscribed. There is scope to provide high quality care for children age 3 – 7 before and after school and for primary age children (3-11) during the holidays as well in the Free School.

We know the building well, having moved out of it three years ago. It has been used in the interim by a new academy awaiting a building (Lime Tree Primary School – GLF). We anticipate that there will be substantial refurbishment required. However, the quaint building is much loved locally by people who attended as children.

We anticipate creating a ‘Village School’ atmosphere. As a very large school at Sandcross, we have worked hard to ensure that the potential for feeling overwhelmed in a spacious environment is reduced, but we are aware of a significant group who would feel much more comfortable with their children starting out in a small, cosy environment, then joining the larger setting at Year 3 well-prepared for the change. The Free School would have access to all the benefits of a large organization, within a smaller setting.

The community around the school is socially diverse, with three large areas of social housing within [REDACTED], mixed with owner-occupied and privately rented. Our context is therefore unusual in relation to the affluence of [REDACTED] and a third of the children come from homes where there is significant disadvantage, many living in overcrowded conditions in small flats with little access to outside space. In addition to the high percentage of disadvantaged families, we have a reputation for making a substantial difference to children with SENDs. Typically, parents who have concerns about their child at infant school, whether maintained or independent, will choose to send them to Sandcross at Yr 3, rather than to the Junior school in the town which has a more affluent intake and is unable to accept children with significant physical or emotional disabilities due to their listed building.

We are passionate about securing an excellent education for every child. We believe that continuity and stability is a big factor in securing success for a child, especially a child facing additional challenges in their life. We are doing really well in our mission to secure success for every child – our targets are always 100% ‘age appropriate plus’ in every year group and we have actually reached that several times at the end of KS1 and are often in the high 90% in KS2, with between a third and half of children excelling (old Level 5+).

The greatest barrier to further success has been the massive impact of the Yr 3 intake. At the end of Yr 2, almost every Sandcross child attains the standards expected for their age and continues to thrive. Almost all are able to express themselves well, read and write well, be able to spell at least the 200 most common words and be able to multiply by 2, 5 and 10.

Each year we induct an extra 60 or 70 children into Yr 3 from a variety of infant settings - maintained, independent and special, all with different values and expectations. The children who we have educated since EYFS and through KS1 have to be organised into different classes, which has a destabilizing effect on them. Children join us with a wide range of needs, often uncommunicated prior to actually setting foot in the door, despite the excellent transition procedures carried out by the SENDco, Yr 3 Leader and SLT. Despite excellent teaching and an imaginative and flexible curriculum designed specifically for the context, on paper, progress in Yr 3 is less strong than in the rest of

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

the school, especially for the new joiners and we have to be extremely creative in finding new ways to accelerate the learning of many of the joiners.

Opening a Free School with Sandcross curriculum and values has the potential for us to offer the Sandcross 'recipe' to another 60 children per year from Yr R, 1 and 2, potentially creating greater stability, even though the children would still move at Yr 3. Close links between the two separate schools would be planned from the start. We recognise the need for a fair and inclusive admissions policy, hence note of caution here.

### **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		60	60	60	60	60	60	60
Year 1		0	60	60	60	60	60	60
Year 2		0	0	60	60	60	60	60
Year 3		0	0	0	60	60	60	60
Year 4		0	0	0	0	60	60	60
Year 5		0	0	0	0	0	60	60
Year 6		0	0	0	0	0	0	60
Year 7	N/A							
Year 8	N/A							
Year 9	N/A							
Year 10	N/A							
Year 11	N/A							
Year 12	N/A							
Year 13	N/A							
Totals		60	120	180	240	300	360	420

## 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
------------------------	----------------	----------------------	----------

EYFS	(30)	M	eg 8.45 – 3.15
Continuous Provision based on ELGs and achieving a GLD for all	23.5	M	EYFS curriculum will have a strong focus on personal and physical development, speaking and listening, counting, phonics and fine motor control, indoor and outdoor provision. Picture books, storytelling and role play at the heart of learning.
Lunch	5	M	Healthy meals cooked at Sandcross and delivered
Music	1	M	Specialist Music weekly, class daily
Assembly	0.5	M	EYFS join KS1 assemblies weekly
KS1	(30 )	M	
Phonics and spelling	2.5	M	Multi-sensory, small groups 2x daily
Letter formation	1	M	As above
Reading aloud	1.5	M	1:1/group/class – daily activity
Expressive Writing	2.5	M	Cross-curricular context, SpaG
Numeracy	5	M	As above
Science/Tech/IT	2	M	Cross-curricular context and purpose
History/Geog/RE	1.5	M	Half termly deep focus, not weekly
Art and Design	1	M	Skills based/expressing learning
Music	1	M	Specialist Music weekly, class daily
French	0.5	M	Linked to creative activity/music
PE/Dance	2	M	Also outdoor curriculum activities
Assembly	0.5	M	EYFS join KS1 assemblies weekly
PSHE/Circle Time	1	M	School/British Values+ relationships
Lunch	5	M	Healthy meals cooked at Sandcross and delivered

Exploring and applying	2	M	Cont. Prov. – no ‘playtimes’
(Home Learning)	2.5	(V)	(share a book, phonics, counting, daily. Creative research opportunity, choice of media)

[Add more lines as appropriate]

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

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

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

- Typically 30% of our pupils will be socially and economically disadvantaged. They will come from homes where a large TV dominates and there are very few books. Parents are unlikely to have studied beyond the age of 16, if indeed they stayed in school for that length of time. Some are unemployed and have never had a job. Others are in and out of jobs on very low pay.
- Such families are often quite unhealthy. Smoking and excess drinking is common and from this comes an element of domestic violence. Few families in this group have a garden of their own and where gardens are shared, there is conflict between families.
- In order to meet the needs of this group, we have a strong focus on eight areas:-
  1. Speaking well, in full, grammatical sentences
  2. Learning to love books and understand how reading frees up a person to learn for themselves
  3. Physical strength, agility, speed, balance and fine motor skills
  4. Learning how to make and sustain positive interpersonal relationships
  5. Enterprise. We consciously teach children the difference between needs and wants, the value and cost of food/clothes versus that of Playstations/Smart Phones
  6. Music – especially singing. All our children learn to sing well, in parts, with a good sense of rhythm. This strengthens breath control and articulation, increases vocabulary and creates an amazing sense of community when large groups perform together. Performing in public does wonders for raising self-esteem.
  7. Personal development, self control, choice and risk assessment
  8. The joy of becoming deeply absorbed in creating something of worth, becoming absorbed in the process, losing yourself in a wonderful book or a piece of music
- Roughly 1/5 of pupils are likely to start life in a household where the first language is not English. (Current pupils at Sandcross – 128/750)

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

- When children start school with no spoken English, we encourage them to keep talking in their first language, writing too, if they are already able to do this
- We have a to have a close focus on key words every day in every session and lots of visual prompts
- Phonics works well for most of these children
- We expect them to be bi-lingual within two years - a huge advantage and something that enriches our school
- Placing French on the curriculum at an early age gives every child the chance to experience another language at an age when the brain is very receptive to sounds
  
- In every class, we have several children on the autistic spectrum, ranging from those with EHCPs who require a lot of 1:1 provision, to those who are intelligent but hypersensitive to stimulus of any kind. Roughly 8% of pupils are likely to exhibit these characteristics.
- 'Current trends suggest that the number of children diagnosed with Autism may increase by 60% by 2020' (Children with Disabilities Needs Assessment Surrey County Council October 2014)
- Parents with children like this in the local area often seek out our school having experienced difficulties elsewhere. We envisage that the Free School could provide an environment which would be attractive to them
- Sandcross Primary School has a very good reputation and 98% of parents recommend it to others (Parent View)
- The LA holds waiting lists for Yr 3, 2, 1 and R. The Sandcross 'recipe' is widely respected. We can't replicate the new building with our proposal, but we can offer more of the innovative approaches we have taken to secure success for every child and we may be able to make the interior and exterior learning spaces similarly appealing.
- Based on our success so far, we may also attract parents to the Free School who value our inclusive approach (success for all/no 'ceilings' on what a child may learn) and are keen to secure a Sandcross education from Yr R to Yr 6.
- The 'no ceilings' philosophy has been particularly favoured by parents whose child excels in some way. For example, if a child joins Yr R reading fluently, we personalise the approach we take, ensure that gaps are identified and filled, whilst ensuring that a wide range of attractive and appropriate books are made available to the child. We also coach the parents in providing appropriate support for children like this, ensuring that the focus is on bringing out the best in the child.
- Our curriculum must be intellectually challenging, whilst delivering essential skills that will sustain learning for life. We use Bloom's Taxonomy to help staff plan activities which create opportunities for analysis, evaluation and creative application, making use of the firm foundation of skills needed for every child.
- We group children carefully in order to meet needs, avoiding words which pre-judge or label a child such as 'low ability' (we prefer 'less experienced' or 'low attainers'). Every child is offered activities which enable them to be intellectually challenged, though some may need to spend a greater proportion of their time overlearning and rehearsing at a more basic level.

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

Our curriculum is based on six core values. We are...

1. Contributors
  - (learning to join in, participate, share ideas, join a club, contribute to the life of the school)
2. Peacemakers
  - (learning to get on with others, be calm and have self-control, be respectful yet assertive)
3. Imaginative Thinkers
  - (learning to explore and experiment, try out new ideas, express individuality, invent and create, solve problems, think deeply, reflect)
4. Courageous Learners
  - (learning to speak out in defence of others, try new experiences, overcome fears, assess risk and take action)
5. Great Communicators
  - (learning to speak clearly and be understood, read aloud well and make presentations, write to be understood and convey accurate, clear, appropriate, grammatical messages)
6. Resilient Learners

These values underpin all the planning and deepen the learning.

They translate into a series of well thought-out topics, often with a great example of age-appropriate children's literature to inspire further learning. Examples include:-

'Going On A Bear Hunt' and 'Little Red Hen' – EYFS

'The Tiger Who Came to Tea' and 'Where the Wild Things Are' - Yr 1

'Top Gear' and 'Let's Put On An Art Exhibition' – Yr 2

### Home Learning

- Not compulsory but strongly encouraged and promoted so that every child sees the worth of engaging
- Partnership with parents is crucial and we have found ways to make it simple for parents to support their child's learning
- Once children have a firm grasp of phonics they start on learning spellings. We have a series of 'Dojo' awards up to Black Belt (45 at a time). Each 'Belt' represents a set of deeply learned spellings
- We've found that having a series of awards to be earned by deeply embedding a large amount of information has enabled almost all children to securely assimilate an important foundation of spellings, taught at school and rehearsed at home. Parents tell us when they feel their child is ready to be assessed for the next 'Belt'.
- This also applies to number bonds and tables. We expect children to know all number bonds at speed and all multiplication facts for 2x, 5x and 10 x by the end of Yr 2. Many will exceed this and we don't hold anyone back in their learning.
- Invitations to engage in creative research tasks are very popular. We offer a choice of creative ways to respond. Making a model is a great favourite. This form of Home Learning promotes lots of discussion at home and provides a platform for talk.

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

By the end of KS1, we expect every child to be a confident and articulate speaker, reader and writer, able to add and subtract small numbers at speed and larger ones with understanding. We expect them to have well-formed, joined handwriting and to be able to present work with care, even if they cannot yet write at length. We expect them to have a wealth of knowledge and a rich vocabulary linked to the topics they've studied; to have self-control and respect for everyone they meet. We also expect them to be confident users of a range of software and to know how to create simple programs.

### **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**

#### Summative

- We use the Early Excellence Baseline for EYFS. Although attainment on entry is low for many of the disadvantaged children, the target is always to try and accelerate learning so that every child reaches or excels within the curriculum expected for their age.
- Judgements at the end of the EYFS are based on the Early Learning Goals, with the aim of securing a Good Level of Development (GLD) for almost every child. We are working towards a target of 100%, but like most schools with a similar context, even 70% getting to the GLD represents huge progress for the children concerned. None of our children start school in the September of Yr R at a GLD.
- We use 'Tapestry' for capturing learning in a areas and sharing with parents, who also contribute learning from out for school via this website
- We also have specific assessments for speech and language, enabling us to implement activities and interventions which have a very clear focus area.
- Yr 1 Phonics Test is used and followed up in Yr 2 and beyond where needed
- Yr 2 SATs provide a useful end of stage marker
- The system for tracking of progress is efficient and informative. Half termly data collection and analysis of that data provides evidence for robust Pupil Progress

## **D2 – measuring pupil performance effectively and setting challenging targets**

reviews with teachers. From these, we plan interventions or other strategies to help children catch up if they have fallen behind in relation to their prior attainment or the national standard or need additional provision in order to reach that standard

- We are strong believers in early intervention. Reading Recovery has been an essential element in securing success for children age 6 at Sandcross and we would be seeking to run this in the Free School as well

### **Formative**

- Based on 'Assertive Mentoring' principles, every child has an individual session with their class teacher once every half term, to discuss their personal development, attendance, attitude and progress. They work on 'next step targets' so that they reach 'green' for progress, behaviour and values
- Positive feedback is given verbally all the time so that children know what is wanted in terms of thinking, contributing, learning, courtesy and making an effort
- Children who experience difficulties in their personal development have individualized plans and work hard to become 'green' over time
- For emerging readers and writers, every attempt at mark-making is given value and the meaning is responded to, alongside assessment of letter formation and use of phonics
- We teach the language of storytelling and every child is expected to be able to help create and follow a story map, reciting the whole structure from start to finish, using the connectives and rich vocabulary that form a model they can build on
- Written work is marked with a consistent approach across the whole school, highlighting successes in one colour and something to work on in another. As children develop the ability to write at length, they are taught how to self-assess against given criteria, something we find has added challenge for the more confident and experienced writers. Feedback from moderation described the quality of marking as 'amazing'.
- For mathematics, the principle of 'concrete, pictorial, abstract' informs planning and the way adults respond to a child's understanding. We use a series of short assessments to determine the gaps in a child's knowledge and planning is based on the identified needs.
- The recording of children's learning comes in many forms and is often cross-curricular. Enthusiastic children explore, discover and remember information easily about Science, History, Geography and other foundation subjects. We use this thirst for learning as a catalyst to achieve the main goal, which is to ensure that children are becoming confident, articulate, literate, numerate and able to cope with changes and challenges of all kinds
- We have a good record of working with other schools to moderate standards. The Free School staff will have partners at Sandcross with whom they can plan and assess as well as moderate standards. We plan to continue to work with schools beyond the Trust and to employ advisers to ensure appropriate rigor.
- We envisage data being presented to the Trust in a unified format across both schools, supported by an experienced external consultant for the first year to facilitate consistency and rigor when benchmarking assessment data across the schools and with other partners who may wish to join us

### **Sharing with Parents**

### **D2 – measuring pupil performance effectively and setting challenging targets**

- Every child has an individual folder showing their progress in chart form, backed up by samples of assessments made and awards gained
- We taken a very honest approach to assessment with parents and ensure that they know whether their child is on track to reach the expected standards, or indeed excel within them
- Termly Parent Consultation meetings are held for this purpose, but in order to make contact with every parent, we also hold after-school sessions at other times
- In the EYFS we visit every family before the children start with us and make a feature of welcoming parents and children every day

### **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**

The plan is to recruit a Principal Designate one year before opening the Free School who would be 'Head of School'. [REDACTED] is prepared to continue to support the development of the Trust in whatever capacity is needed to establish a secure future. External consultants would be recruited for coaching the leaders and ensuring that effective monitoring is used to secure continuous improvement.

Small schools are barely viable on their own. It will be essential for the Free School to buy some services from Sandcross Primary. Staff will be appointed by the Trust and Business Manager, working in partnership with the Principal Designate once appointed.

- Principal designate to be appointed one year in advance:-
- Head of School – an excellent teacher with senior/middle leadership expertise L4
- NPQH standard.
- Reception teacher with leadership potential MPR/UPR1 + TLR 2, SLE
- Reception teacher MPR – could be NQT (we train SCITT students in all phases up to Upper KS2 and may well have someone suitable)



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

- Music Specialist 2 hrs per week (also teaching at Sandcross) to help with assemblies and cover part of PPA
- 2 x EYFS Teaching Assistants 8.30 – 3.30 term-time only
- 1 additional assistant to ensure safe staffing levels at all times 8.30 – 3.30
- Specialist speech and language input daily for high needs children
- 1 x catering assistant to serve lunches 11.45 – 1.00
- Remaining PPA cover to be provided by Head of School
- A developing culture of SLEs (training planned SU 2016 should enable effective coaching and monitoring to take place, using expertise from both sites and strengthening the development of leadership
- Premises staff, Administration Assistants, Family Engagement Practitioner, SENDco support, services of School Business Manager to be purchased via Sandcross on hourly or daily rate
  - Experienced Education Consultant to be bought in as coach for Head of School and to support tracking of pupil progress 12 days in first year , 9 in the second and third ( [REDACTED] respectively)

\*\*\*\*\*

2<sup>nd</sup> year

- As above plus....
- Two more teachers to make provision for Yr 1, one of them SLE
- Two more TAs (FTE) plus one 11.30 – 2.00
- Additional 2 hours from Music specialist

• \*\*\*\*\*

3<sup>rd</sup> year

- As above plus ....
- Two more teachers to make provision for Yr 2
- Ideally two more FTE TAs plus one 11.30 – 2.00
- Appointment of Assistant head of School from among the six teachers

NB, the curriculum can be provided with fewer teachers and TAs if the pupil numbers will only support one form entry

**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**

There is only one school rule – ‘We show kindness and respect to everyone’ and we would anticipate continuing with this simple ethos as it works for everyone.

The school values provide a structure for making this work and link closely to promoting British Values(see C1). We would anticipate developing a School Council and encouraging all children to contribute their ideas in a democratic fashion. Pupil voice plays a large part in the Sandcross ethos.

A small number of families in the community are active worshippers at local churches.

We also have one or two Muslim families, some Hindu and occasionally Buddhist.

There is also a Plymouth Brethren community close by. The majority of families are not active worshippers of any faith. We envisage that the Free School will maintain this culture of respect for all, welcoming families of all faiths and none and making adaptations to include them. It’s important that everyone feels a sense of belonging.

Therefore:-

- Assemblies provide a mechanism for creating a strong ethos based on the values
- Collective Worship provides an opportunity for reflection within assemblies and is broadly Christian in ethos, without requiring children to engage in worship
- So far no parent has felt the need to withdraw their child from RE or Assembly in the past five years

We do invite religious leaders from the local area to work with the children once a term. So far these have all been Christian leaders, or parents willing to share their experiences of for example a Muslim Wedding or a Diwali celebration. We ensure that no child is ever asked to engage in worship, by explaining that, for example, there will be a prayer and they are invited to listen and to join in if they wish. This has been an acceptable approach for all our current families.

Within the curriculum, we celebrate the diversity of the school through the humanities topics studied, linking to relevant books and stories and consciously raising the profile of famous people from different cultures. Our curriculum is sufficiently flexible that if a child from a different culture joins a class, there is scope to build on elements of their unique knowledge eg of a language, food, celebrations and customs. Parents too are invited to contribute.

The RE syllabus includes the study of different faiths and customs and children are encouraged to develop a broad understanding of Islam, Christianity and their associated festivals.

In creating topics which enable children to compare their familiar environment with other parts of the world, we have been careful to ensure authenticity. For example, a topic that used to look at ‘Africa’ in Yr 1 has now become a study of animals in Kenya and homes in cities and villages in that country. We have a link with a school near Mombasa that was started by a couple of people from Reigate.

Smart uniform is expected from every child and we make it possible for every child to have a uniform and belong. There are no rules excluding specific items of clothing associated with particular religions. The caterer is able to provide for a variety of dietary and cultural needs and this has not been a problem for any family so far. Where modesty of girls has been raised as a cultural issue, we have made modifications, for example allowing the wearing of dark tights or pleated culottes all the year round, rather than insisting on summer dresses.

In appointing staff to the school, we look for people with a deep understanding of cultural diversity. We welcome people of different faiths and ethnic groups, however,

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

the ability to speak excellent English is essential as this forms the bulk of the desired outcomes for children, many of whom cannot access this from home.

We are careful to teach children that people have different beliefs, including their beliefs of how the world began. Listening to stories from different cultures about their origins is part of our teaching. Science-wise, we find that children are fascinated by artefacts such as fossils and rarely question evolution. However, if a family were to insist that we taught anything that indicated that evolution was not a reality, we would have to insist on a policy of honesty based on evidence.

This may seem a brief summary ( the criteria suggests five pages) but our school is wholly founded on inclusive principles – even the songs we sing are chosen with care so as not to exclude any child or family from participating.

## Section E – evidence of need

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

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

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

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

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

The local authority have asked school leaders in the Reigate, Redhill, Merstham area to help them find solutions to the projected demand for places over the next six years. That was our starting point for opening a Free School.

They are supportive of our plan to open a Free School and have provided us with the capacity data needed see Annex 1. This data clearly illustrates the 'basic need'.

There is no significant surplus of places in the local area.

#### Underperforming schools in the locality

All of the schools within three miles of us are rated 'good' or 'outstanding'. Please note the difference in context and the fact that in 2013 and 2014 our results were very favourable by comparison.

St Matthew's Redhill is rated RI and is improving. It is [REDACTED] away and has 450 pupils on roll.

Salfords Primary School is just over [REDACTED] away. It is now becoming a sponsored academy under GLF. Parents who have visited our school are positive about the improvements taking place there, but several children have moved across to Sandcross. This is not something we wish to promote or encourage. The NOR is not in the public domain at this point.

There are three schools in Horley who have recently improved from RI to Good. Whilst we have good relationships with these schools, it is unusual for parents living five miles away to consider Sandcross over a local school.

Pressure for places at Sandcross is strong in the EYFS. This year, there are a total of 259 families potentially wanting places at Sandcross, 96 of them first preference applicants, 61 second preference. We can only offer 60. There is clearly going to be demand for further provision and the figures provided by the LA show this to be a concern for the next six years. Families in Meadvale, just a mile away, are sometimes left having to drive to Horley in order to access any school. If we were able to open our Free School, this would release the pressure on families living to the east of us.

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

There is also pressure on entry at Yr 3, with a total of 197 parents naming Sandcross as a preference, 57 of them first preference applicants and 111 second preference. There is less oversubscription in the area for Yr 3 places, but enough demand to fill our PAN. Our ideal situation would be to offer automatic entry into Yr 3 from the Free School, thus securing continuity of education from 3 or 4 to 11.

#### Nursery provision

We have a 60 place P/T nursery at Sandcross, which is oversubscribed.

We would like to offer nursery provision at the Free School but we anticipate that this will be a different model.

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**

We have experience of consulting the community and developing promotional material, having gone through the process of combining two schools into one. We already have materials that could easily be adapted to encapsulate what will be on offer and these are aimed at parents of children aged three, four, five and six as that is when the majority of pupils join Sandcross. The governor who was so influential in helping us manage the consultation process and make our vision clear and visible is in now a founder member of the Trust, so we have access to her expert advice.

We have not yet attempted to make our proposal public as this is new territory for us and we need to know if the [REDACTED] considers our proposer group to be suitable. We are aware that we are not tackling this proposal in the recommended order, but should we receive an encouraging response, we are prepared to continue to invest our own time in the project.

We are trying to start something new, that is of our own making. This is because we find that, due to the unique context of the school in this area, (high FSM and SEN compared to local schools) the shared CPD available in partnership with the closest schools is often on a topic that is not high on the list of priorities at Sandcross. The group of schools we work with closely includes schools in the recently formed South East Schools Teaching Alliance. Together we have been exploring the possibilities around academisation. That group is not yet ready to form a Trust, whereas at Sandcross we have been working towards that goal for over a year and have just succeeded in taking this important step. Whilst we intend to continue to collaborate on learning events with this familiar group, our plan is to start something new, that will be

## **E2 – successful engagement with parents and the local community**

of particular benefit to families living within a mile of [REDACTED], where Sandcross is situated.

We would expect most pupils to come from [REDACTED] and [REDACTED] Those living further afield tend to be children who have joined because of a house move or have requested a change of school. The families in parts of [REDACTED] and parts of [REDACTED] currently find it very hard to secure places in a local school. School Checker shows that Sandcross has quite a small catchment in relation to the size of the school, with another pocket at [REDACTED]. Dovers Green, St John's and Reigate Parish also have small catchment areas. None of these are fixed catchments, but demand is high. Reigate Priory has a wider catchment and we all overlap to some extent.

## 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.





<p>[REDACTED]</p>	<p>[REDACTED]</p>		<p>[REDACTED]</p>	<p>[REDACTED]</p>	8
<p>[REDACTED]</p>	<p>[REDACTED]</p>		<p>[REDACTED]</p>	<p>[REDACTED]</p>	1
<p>[REDACTED]</p>	<p>[REDACTED]</p>		<p>[REDACTED]</p>	<p>[REDACTED]</p>	1

[REDACTED]	[REDACTED]		[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]	1
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## F1 (a) Skills and experience of your team

We have a wealth of experience between us. Back in 2009, our school was on two sites, having previously been two separate schools – an infant school in challenging circumstances and a junior school which had improved and was well respected. Our [REDACTED], [REDACTED] joined in January 2010 and was initially [REDACTED] of both sites. She immediately appointed a new [REDACTED], [REDACTED]. The two worked closely in consultation with staff and governors and quickly secured [REDACTED] from Surrey LA to bring the schools together on one site. The process was not so very different from this one. We had to show in detail how we would ensure that our vision would be of benefit to the local community. Leadership and Management is far stronger now than it was at the time. The SLT has grown in size and capability and middle leadership in the core subjects is very effective. The [REDACTED] who are supporting the bid as members are highly skilled professionals with extensive and successful experience in financial management, marketing, management consultancy and Trust formation for the NHS. Two of them are, or were parents at the school. Our [REDACTED] was recruited in 2014 to help us form a Trust.

1. The project is being led by our [REDACTED], who has extensive experience of [REDACTED]. She is supported by our current [REDACTED], who will be retiring from Sandcross in August, but is totally behind the project and is willing to continue to give her time and expertise. She has significant expertise in [REDACTED].
2. We have already secured the support of the Governing Body and the current and future Leadership Team of Sandcross Primary School through discussions and formal presentation
3. The LA are supportive of us opening a Free School to help meet local demand for places and those we have spoken to at the DfE have also given us warm encouragement
4. If our bid is successful, we will work with the leadership team and HT designate to present the vision to staff, showing the benefits for their career development as well as for the children
5. We will work with parents through face to face meetings, starting with small consultation groups, then larger gatherings
6. The existing [REDACTED] and [REDACTED] have been through similar processes in creating Sandcross Primary School. Creating staffing structures, managing HR issues and developing a curriculum is what they do best, as well as developing capable leaders and managers and building a positive, inclusive ethos.
7. One of our [REDACTED] has advanced skills and experience in [REDACTED]. Because of her input, we set out to make Sandcross extraordinary from the start, whilst understanding that it would take time for prospective parents to feel the same. We'll be drawing on that expertise again.
8. The other two [REDACTED] have extensive experience of [REDACTED] in opening new organizations
9. We already have a model for creating publicity material and would be able to use this as the basis for making sure that the existence of the proposed school was widely known before the time comes for making applications

**F1 (a) Skills and experience of your team**

10. Our ideal would be to appoint a principal designate one year in advance of opening

We would want to ensure there had been sufficient opportunity to let parents in the area know of this exciting new provision if we were to consider opening in September 2017. Otherwise there is a risk that the school will be filled with late applicants who have no affiliation to Sandcross. We have had experience of this five years ago when we offered to take a 'bulge' class.

## 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
Operating as an Education Trust	<p>None of us on the proposer team or Trust have run schools in quite this way before. [REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>We have worked with South Farnham Trust and GLF and have learned a lot. We also have a link with The Oaks Trust at Banstead. [REDACTED] have also attended Academies Roadshows and are aware of the services available to support developments.</p>	Continue to take advice from the DfE and New Schools Network and establish links with newly opened Free Schools.
Principal Designate	Not yet ready to appoint this role, but the current governing body have an excellent procedure in place, having just appointed the next HT for Sandcross.	Appoint at least one year in advance of opening, ideally from within or onto the Sandcross staff whilst preparing for the opening of the school

## **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**

It is our intention to form a Multi Academy Trust to initially include our current Maintained School (Sandcross Primary School) and the new Free School (Sandcross Alexander School). It is proposed that the new Free School Governance structure will be based upon the current Governance Structure at the maintained school. Our Governors operate as a Board with monthly meetings and specific responsibilities. Our [REDACTED] brings experience of [REDACTED] and advanced [REDACTED]. The level of challenge is high. Our Governors are well informed about aspects of school life and bring sophisticated skills in [REDACTED].

The structure for forming the Trust has been initiated with three Members, who are also Trustees, this number would grow during the pre-opening stage to a maximum of 15 Trustees to ensure the optimum range of expertise is achieved to ensuring robust Governance and challenge exists. If the Trust were to expand further the intended structure would include establishing Local governing bodies for each school within the Trust.

This is the proposed model of governance for establishing the MAT.

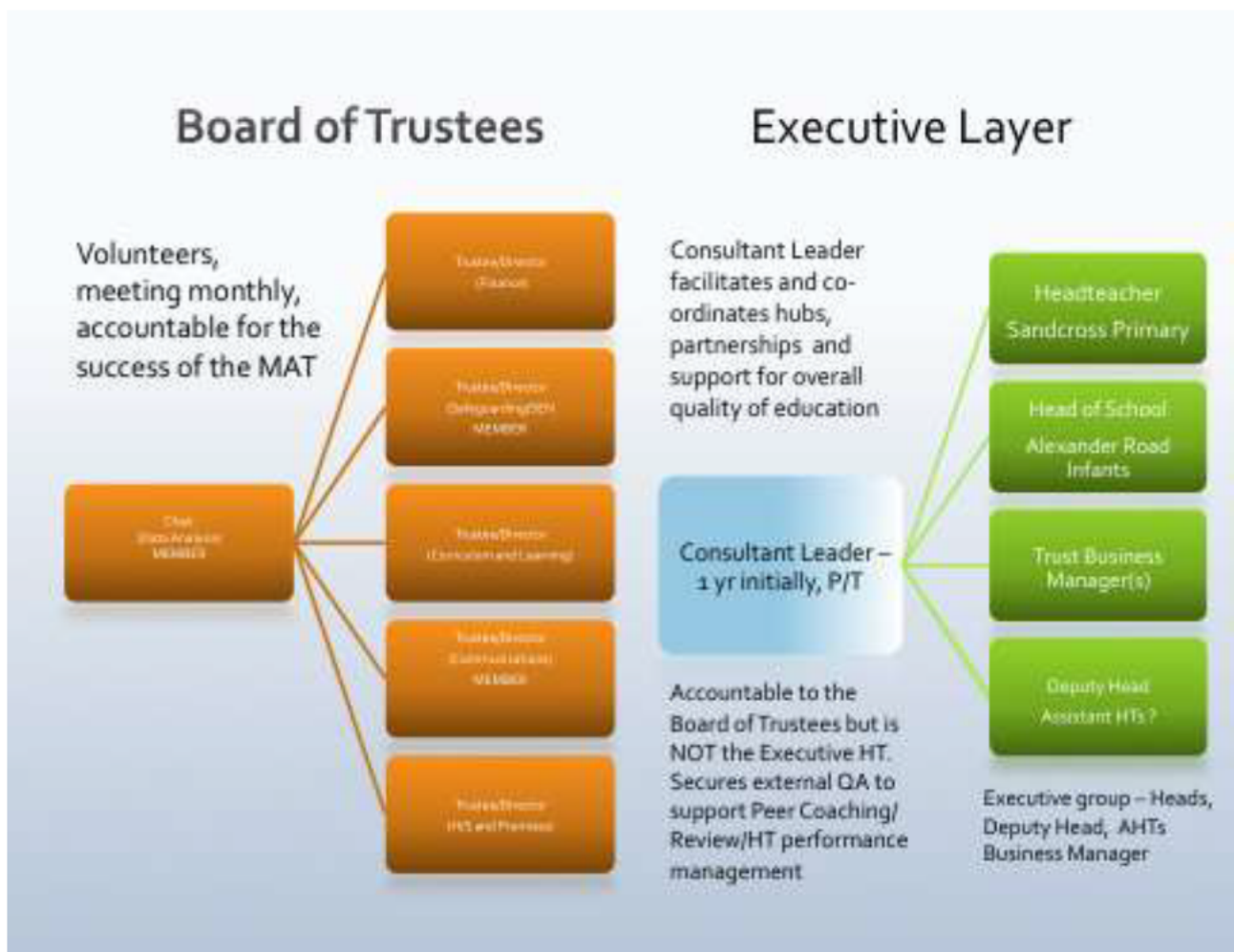
- It is envisaged that the Consultant would be more of an advisor than a leader and would be commissioned for a few days each term.
- The Executive layer would be small to begin with as indicated, but has scope for further expansion in the future, allowing the MAT to grow.
- There will be a need to develop a layer of local governance between the Trust and the Executive layer to ensure that the workload is manageable and allow Trustees to become even more strategic.
- All our Members and potential Trustees are experienced governors who understand Sandcross Primary School and the community in depth. They work closely as a team and take their responsibilities as a Board of Governors very seriously. In addition to the three founder members, we have six more experienced governors (not including staff governors)
- Whilst supporting this opportunity to start something new, they are keen to ensure that other people with the relevant skills and experience are recruited
- As governors, we are all familiar with the importance of recognizing and declaring conflicts of interest – this is on every agenda
- There could be a potential conflict of interest for [REDACTED], who is currently the [REDACTED] at Sandcross. [REDACTED] is providing the educational expertise for creating the Trust, the Free School and the MAT and is willing to continue to do so following [REDACTED]. She will not be an employee of Sandcross Primary School beyond the end of August, but is working with [REDACTED] to prepare the application and

**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**

help to establish a secure future for the MAT. Both are using their own time to make this possible.

- There could be a potential conflict of interest for [REDACTED], who is an employee of Sandcross Primary School. She is a member of the [REDACTED] and will be providing the [REDACTED] for the Free School, on behalf of the Trust

Sandcross Primary School has been seeking a reason to convert to academy status. We were invited to do so in a letter from the DfE in 2014





### **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.

<b>F3 – independent schools have a good educational track record and credible plans for meeting the standards of the state sector</b>
[Add text here. Table expands]  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.

<b>F4 – Independent schools have a good financial track record and credible plans for meeting the standards of the state sector</b>
[Add text here. Table expands]
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.

<b>F5 – Independent schools have an appropriate, well-maintained, and secure site</b>
[Add text here. Table expands]
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

Over the past 6 years our current school has continued to maintain healthy balances allowing outstanding quality teaching to be provided for our children. The school is very well maintained, resourced with excellent equipment to help every child excel. The budget is created to support the delivery of the School Development Plan, the intention is to replicate this at the new school.

If our application were to be successful it is our intention to secure savings via economies of scale across both our current and new school. Budgets are driven by pupils on role and as such in the first years of opening the available funds would be limited. It would be the intention to centralise support for administration and premises, the new school purchasing support and services for the following;

- Staff recruitment
- School Business Manager
- Finance functions
- Financial reporting
- Health and Safety
- Caretaking and cleaning
- Premises
- Administration

This will allow the new school to access high quality services without the need for supporting the full cost of staff salaries representing excellent value for money.

As a large Primary school we are experienced at creating staffing structures, monitoring these against the need of the children and the incoming funding, the aim being to keep this expenditure as close to 85% of the budget share as possible.

Economies of scale are anticipated by purchasing the following services as a Trust;

- Legal services
- Financial auditing and reporting
- Property services
- Payroll
- HR

**G1 – budget planning and affordability**

There is the potential for income generation by replicating the current school holiday provision operating from our existing site during Easter and Summer providing much needed childcare for local families.

We currently run a maintained Nursery which operates a waiting list despite having increased pupil numbers from 27 to 30 at both am and pm sessions in September 2015. The intention would be to offer full day care provision from the new site providing flexibility to our parents and the local community. The charging policy would be in line with local provision currently on offer. This would allow the nursery to be self- supporting financially.

## **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.

## Annex 1

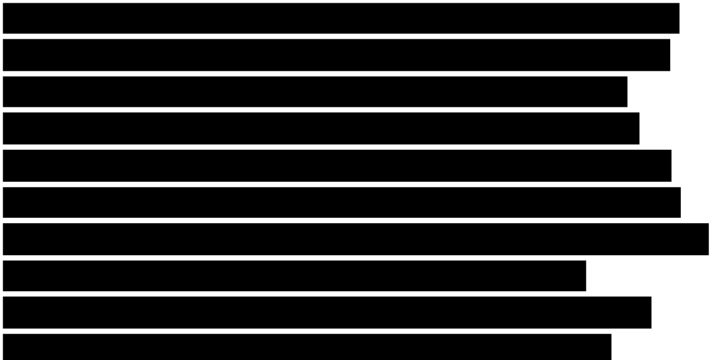

### Section E1 – Evidence of Need

The table below was supplied to us by [REDACTED] for Surrey County Council on 2<sup>nd</sup> February 2016 detailing the projected shortage of Primary provision within our area

Year	YR PAN	YR Projection	Projected Surplus
2016/17	900	994	- 94
2017/18	900	979	- 79
2018/19	900	956	- 56
2019/20	900	945	- 45
2020/21	900	951	- 51
2021/22	900	957	- 57
2022/23	900	961	- 61
2023/24	900	966	- 66
2024/25	900	973	- 73





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

CV template		
		[Redacted]
8	Reference names(s) and contact details	[Redacted]





CV template		
		<ul style="list-style-type: none"> <li>• [Redacted]</li> <li>• [Redacted]</li> </ul>
7	<p><b>Optional:</b> brief comments on how the role you played helped to raise standards in any or all of your three previous roles.</p>	[Redacted]
8	<p>Reference names(s) and contact details</p>	[Redacted]



**CV template**

- 5A\*-C GCSE including English and maths results or, for **16 to 19**, average point score per entry and per student for level 3 qualifications
- school's best 8 value added scores for the years you were in post, if applicable

[Redacted content]

5b **For education only:** if you are in a teaching or head of department role in your

N/A

**CV template**

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




**CV template**

**2<sup>nd</sup> referee**

[Redacted text block containing several lines of blacked-out information]



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

**CV template**

to raise standards in any or all of your three previous roles.

8

Reference names(s) and contact details

[Redacted reference names and contact details]



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



## Self-assessment form for independent schools

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





<b>Your assessment against Ofsted framework (please provide a commentary) Review outcomes - current position</b>		<b>Your self-assessed Ofsted grade (1-4)</b>	<b>Required position - risks, actions plan (including priorities identified) and timescales</b>
<b>Overall Position</b>	[Please provide an overall commentary on your school, with reference to the Ofsted grade descriptors, please delete this guidance before submitting this form]		
<b>Achievement of pupils at your school</b>	[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><b>Quality of teaching in your school</b></p>	<p>[In this area, one might expect to see a clear understanding of teaching quality across the school and accountabilities to ensure the dissemination of outstanding practice and delivery of performance management.  Staffing structure and accountabilities in relation to the curriculum and any new curriculum changes that might be developed due to the changing nature of the intake.  Consistency of student presentation of work and scrutiny reference progress and standards  How marking, assessment and students feedback/reflection enhances pupil learning  Teaching strategies including setting of appropriate homework, together with a review of support and intervention strategies to match pupil needs  How teaching promotes pupils learning and progression  The review should be validated externally to ensure moderated outcomes for the school  Reading, writing, communication and mathematics across the curriculum.  Tutor and pastoral time including SMSC and British values  please delete this guidance before submitting this form]</p>		
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<p><b>Behaviour and safety of pupils</b></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><b>Quality of leadership in, and management of, your school</b></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><b>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.</b></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><b>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.</b></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><b>1. The roles and responsibilities of the directors/ trustees</b></p>	<p>Please detail your duties as:</p> <ul style="list-style-type: none"> <li>• company directors and charity trustees;</li> <li>• accounting officer</li> </ul> <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><b>2. Structure of the board</b></p>	<p>Accountability system</p> <p>Structure of decision making</p>	

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



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