



Department
for Education

Free school application form

Mainstream, studio, and 16 to 19
schools

Published: July 2016

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

ABBAY FARM EDUCATE TOGETHER, Swindon



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The application form explained

Before completing your application, please ensure that you have read both the relevant [how to apply to set up a free school guidance and the criteria for assessment](#) 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 on page 8 of this 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 *how to apply to set up a free school guidance document* and the *criteria for assessment*, 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. The form is available [here](#).

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. If your documents are larger than 9MB, please send multiple emails clearly indicating that the emails are connected (e.g. email 1 of 3).

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, i.e. the Personal Information form, is required for each member, director, and principal designate who has not submitted forms within the past 365 days; together with a list of those members, directors, and principals designate who have submitted Section I forms within the past 365 days. These need to be submitted by email alongside a copy of Section A (from the Excel template) to due.diligence@education.gsi.gov.uk stating the name of the school in the subject title.

Data protection

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

Application checklist

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

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

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

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

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

Declaration

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

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

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

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

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

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

Signed:

Position: [REDACTED]

Print name:

Date:

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

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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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

Swindon rationale

Swindon Borough Council have undertaken extensive public consultation to develop their Local Plan, this was adopted in March 2015 to focus new development on creating inclusive, cohesive, safe and healthy communities.

The aims of the Local Plan and associated documents are aligned with our ethos, prompting Swindon Borough Council to invite us to bid for schools in the area: Our experience in delivery of an ethical ethos makes us well suited to deliver these aims for the residents of Abbey Farm and [REDACTED]

[REDACTED]

We have extensive experience in school development within new build developments and can maximise the potential of both schools and their education programmes.

We aim to create a hub for community cohesion in a context where many families are new and without extended family networks. The Educate Together schools will play an important and lasting role in ensuring social unity and in building an active and sustainable neighbourhood as described in the Swindon Sustainable Communities Strategy.

Abbey Farm

The Abbey Farm site is yet to begin construction but the need for school places is wider

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

than the development. Families in existing, well established surrounding villages will also attend the school offering an exciting opportunity to work with an existing community as they experience rapid change with an influx of new housing, infrastructure and families. Positive, respectful communication and the chance to influence the local environment are powerful tools in developing coherent communities: An Educate Together school will facilitate these objectives. The Swindon Borough Local Plan emphasizes the importance of ensuring local empowerment and influence (1.24) which is at the core of an Educate Together school.

In addition to community and family engagement, the school will model very high educational standards and extensive engagement with 21st century learning in core curriculum, sports, science, technology and the creative arts.

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

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

Vision for Educate Together Academy Trust UK

Educate Together Academy Trust's vision is to contribute to the continuous reform of the UK education system so that it truly meets the needs of this generation of children in schools. This means that the Trust is committed to an education that will enable children to become confident, happy participants in a diverse, global and sustainable society.

38 years of committed and determined experience has demonstrated the practical application of these principles and its educational and social impact. As a model it has attracted some of the most passionate educational innovators to come to work in our schools and we have no doubt that an Educate Together school in Abbey Farm and [REDACTED] will do the same.

We will forge exciting links with key employers, other educationalists and community leaders in the area to give children at the schools outstanding learning opportunities that challenge cultural and gender stereotyping and inspire them to fulfill their aspirations and potential.

In the short-term in the South West area our aim is to build a cluster of up to 15 primary schools and 2 secondary schools over the next 5 years, creating a group of schools with the same ethos and values but each with its own distinct identity.

Currently the way that our Redfield school delivers the Learn Together curriculum allows for a natural emphasis on cultural and racial diversity, focussing on understanding and integration of children of different faith and secular backgrounds. This is largely driven by the diversity and demographic of the area surrounding the school and is something parents at the school feel strongly about.

At our Parklands school (Weston-super-Mare), due to open in September 2017, early public consultations suggest the school will deliver the same broad ethical curriculum with a natural emphasis on environmental factors led by the location and its proximity to parklands and nature reserves.

Throughout public consultation and the development of the school we would expect themes to emerge, shaping a strong community identity for each school, delivering on the strategy expectation for community engagement and local empowerment.

Despite these local differences in emphasis all our schools will have an over-arching commitment to the education of this generation of children with the values and skills necessary for a happy, productive and sustainable life in the 21st century.

The Educate Together ethos and Learn Together curriculum provides the methodology and tools to allow us to deliver on this commitment.

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

Background Information

The Educate Together Academy Trust is a Bristol-based DfE approved academy sponsor with a vision to contribute to the continuous reform of the UK education system so that it truly meets the learning needs of children for the 21st Century.

Educate Together Academy Trust is committed to an education that will enable children to become confident, happy participants in a diverse, global, and sustainable society.

Educate Together is based on an ethos of equality and human rights with a commitment to sustainable development and ethics in the environment.

The Educate Together model has been tried and tested in many different social settings in Ireland over the past 38 years. The Educate Together model of education is based on four binding principles which define its ethos:

Equality based in that all children have equal rights of access to the school, and children of all social, cultural and religious backgrounds are equally respected.

This “prime directive” permeates everything an Educate Together school does and ensures that the school deeply supports the identity of every child. This is seen as key to the motivation of learning for an individual..

Co-educational and committed to encouraging all children to explore their full range of abilities and opportunities irrespective of gender or sexuality.

This obliges an Educate Together school to deeply engage with and confront the cultural envelopes that can create barriers to a child’s development and to have in place active programmes to confront role stereotypes of all kinds.

Learner centred in its approach to education.

This obliges an Educate Together school to ensure that the curriculum and learning programmes are arranged for the real-time needs of the children in the school.

Democratically run with active participation by parents, pupils and the community in the daily life of the school, whilst positively affirming the professional role of teachers.

This obliges an Educate Together school to really grasp the key role of the parent, family and community in the educational process and ensures that this role develops into a respectful and positive partnership with professional teachers. It also empowers the concept of ‘student voice’ in all our schools.

To support this ethos definition, Educate Together schools deliver a unique ethical

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

education curriculum called *Learn Together*. This internationally recognised curriculum addresses Moral and Spiritual Development, Equality and Justice, Belief Systems and Ethics and the Environment. This is delivered in a discrete daily half-hour period in addition to defining the values that permeate the entire school programme.

Philosophical Rationale

This curriculum recognises that the spiritual dimension of children's lives is nurtured and that children are made aware of a sense of moral and ethical standards in the areas of kindness, honesty, respect, justice, integrity, trust and responsibility. This philosophy is the cornerstone for all interactions within school communities and recognises the pivotal role played by parents and guardians in the development of these standards.

The philosophy also recognises the unique nature of each child and ensures that no child is an outsider through the living out of an ethos that recognises that children have different religious, cultural and social identities. The Ethical Education Curriculum encourages children to explore their own spiritual identities in a secure setting while also being aware of and respecting the notion that other people may think differently to them. The curriculum should celebrate difference and provide the knowledge, skills and attitudes that children need to enable them to make informed moral decisions and live in a pluralist society that embraces diversity.

Children from different social, cultural, religious and non-religious backgrounds have a right to an education that reflects their individual identity whilst exploring the different values and traditions of the world in which they live.

The Educate Together ethos has a core objective of creating a democratic civic space of equality and respect. It encourages the attitudes, knowledge and dispositions that children will need to understand, appreciate and protect such values throughout their lives.

School Atmosphere and Climate

Values underlying the Ethical Education Curriculum are lived out in school through:

- providing children with a sense of security and care by recognising the priority of helping them cope in times of trouble
- providing space for articulation of feelings and emotions
- designing and developing school policies which reflect the values inherent in the Ethical Education Curriculum
- modelling good practice through a respectful relationship between adults and

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

children and also between adults and adults, through the use of respectful and inclusive language

- ensuring a positive teaching and learning working environment
- creating an atmosphere of team spirit and co-operation
- developing a physical environment that reflects the intercultural, inclusive nature of the school
- acknowledging at all times the diverse nature of Educate Together Schools through appreciating the individual and shared beliefs or philosophies of children.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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

	Current number of pupils (if applicable)	2018	2019	2020	2021	2022	2023	2024
Abbey Farm								
Pre-school		20	40	40	40	40	40	40
Reception		60	60	60	60	60	60	60
Year 1			60	60	60	60	60	60
Year 2				60	60	60	60	60
Year 3					60	60	60	60
Year 4						60	60	60
Year 5							60	60
Year 6								60
Totals		80	160	220	280	340	400	460
██████████								
██████████		■	■	■	■	■	■	■
██████████		■	■	■	■	■	■	■
██████			■	■	■	■	■	■
██████				■	■	■	■	■
██████					■	■	■	■
██████						■	■	■
██████							■	■
██████								■
██████		■	■	■	■	■	■	■

complete a separate table for each.

If you are proposing to open later than 2018, please leave the relevant earlier columns blank.

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
Maths	KS1 & KS2 5	Mandatory	
English	KS1 7 KS2 7.5	Mandatory	
Science	KS1 2 KS2 2.5	Mandatory	
Humanities	KS1 2.5 KS2 3.5	Mandatory	Taught through Learn Together and as discrete subjects
DT			
Creative Arts: art, music, drama, MFL			
RE/PHSE/SMSC			
Learn Together	2.5 minimum	Mandatory	

[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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

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

Community-led Curriculum Plan

Educate Together will provide the 'Learn Together' ethical curriculum at Abbey Farm and [REDACTED]. It is a specialist ethical curriculum unique to Educate Together that

Is taught alongside and through the National Curriculum. Each school tailors their

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

curriculum plans to address the needs and identity of the pupil population and the local area identity. This curriculum development is led by the Headteacher and staff with the support and oversight of the [REDACTED] and the Board. The Academy Development Council (ADC) is consulted to ensure the identity of the school is represented. In our existing school, Redfield, this process is collaborative and ongoing, as detailed below.

Overview of Redfield Educate Together pupil population

At Redfield we have 178 pupils across reception, Y1 and Y2. We are currently holding a waiting list for Reception places and received 220 applications for September 2016 Reception classes.

Our current pupil population has 38.7% families who identify as EAL although we expect this to rise with each year due to the demographics of the area and the school's reputation growing locally. Redfield is currently 42.3% BME and the local area is 55.2% therefore we expect our BME intake to rise. We currently support 11% SEN and have 18% of children in receipt of Pupil Premium. We anticipate that this will increase next year as we believe some eligible families are not claiming at present and we are working proactively to encourage them to sign up by. Families at the school represent a wide variety of cultures and social classes with a mix of education levels amongst the parents.

The curriculum is tailored to provide a strong emphasis on Belief Systems and Equality and Justice. The emphasis on responsibilities as well as rights focus on the diversity that the families wish us to celebrate. Recently, the ADC conducted a school wide consultation to develop a school plan which has informed school activities in all areas. This looks at key skills, key competencies and key experiences and staff develop the curriculum to cover this.

Adjustment for pupil in-take

Recruitment of staff for each school in the Trust will take into account the specific needs of the pupil population. For example, if the families with EAL are recent arrivals in the country they may need more help with language development. We have built this flexibility into our costing projections.

In order to ensure consistency of teaching and learning and high standards and expectations the [REDACTED] will carry out quality assurance and report to the [REDACTED]

The [REDACTED] will have responsibility for oversight of Key Performance

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

Indicators, the development of the ethos and curriculum and pupil progress and attainment.

Whilst schools have the same approach to the ethos and values of Educate Together and to teaching and learning, they are encouraged to develop their own identities in partnership with their families and local community. The schools are not identical.

[REDACTED]

Local context

Educate Together has extensive experience of operating schools in varying contexts in rural, suburban and urban areas. Expertise are available to support our work confidently engaging with many different school demographics. The ethical education curriculum has been operating for many years and is well tried and tested. Schools use this experience to plan timetables and ensure there is coverage both of the National Curriculum and this curriculum.

We are able to vary the focus of the curriculum according to the needs of the children in specific communities. For example, our new school at Locking Parklands, Weston Super Mare, the sustainability and environmental aspect is strong: at Redfield it is the diversity, equality and justice and belief systems strands. One is in a new suburban housing development with a very high proportion of new owner occupiers, the other is in an established urban area of Victorian terraced housing and post-war high-rise rented accommodation.

Abbey Farm

Figures taken from table in section E1 and are an average of statistics from neighbouring schools.

8.6% FSM 12.5% EAL 2.9% SEN+

All schools follow the national curriculum and our ethical curriculum, Learn Together. Flexibility is built into our staffing estimates as there is currently not enough information about the development to predict trends more accurately. However the housing development is likely to house families at a higher salary level and as a result a lower percentage of FSM children is likely. The development does include social housing but we do not anticipate that all these families will be eligible for FSM funding.

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

We anticipate the local population to be similar to our Locking Parklands school with a strong focus on development of community and civic responsibility at the heart of activities.

A major road is currently undergoing the planning process so the development is intended to act as a gateway for families working in new business. Themes from the Sustainable Communities Strategy include making Swindon a low carbon city whilst also ensuring that all people benefit from the local economy: this balance will be a strong focus to ensure that all families within the school engage in decision making.

This is an opportunity to model successful industry links with local business for the benefit of pupils and residents.

[REDACTED]

The Ethical Education Curriculum

As mentioned above, both schools will offer our unique curriculum: In an Educate Together school a daily period of time is set aside for the Ethical Education Curriculum. This programme is called the “Learn Together” curriculum and is published by Educate Together. It defines the values core of all teaching and learning in the school. A copy is available upon request.

A UK edition of the Learn Together curriculum was published in 2014, with several UK universities taking an interest including the Graduate School of Education at Bristol University who are currently undertaking a joint research project with Dublin City University on the impact of the curriculum in Redfield Educate Together.

This specialism and focus of ethical education is what makes an educate together

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

school different to other schools and addresses the needs of SBC to promote social justice and improve quality of life (Sustainable Community Strategy, 2.7).

The curriculum is strongly influenced by the key principles which underpin and guide education policy within Educate Together. These have been outlined in Section C.

“Learn Together to Live Together”

The commitment to the four key principles of Educate Together is encapsulated in the motto “Learn Together to Live Together.” All Educate Together schools are committed to this motto through their ethos, their stated values, their characteristic spirit and the day-to-day relationships both within the school and with the extended community.

These principles underpin the delivery of the Early Years Foundation Stage (EYFS) and National Curriculum Key Stage One and Key Stage Two as laid down by the Department for Education.

The Ethical Education Curriculum is intended to support schools in the task of developing individual school programmes which reflect the four key principles and recognise the moral and spiritual dimensions of children’s growth and development.

The aim of the four strands is to nurture and develop in the children a caring and responsible approach to society. All four strands are recognised as equally important and are afforded equal status within the curriculum. While the strands are presented as individual entities in this document, the philosophy underpinning the curriculum views them as complementary and envisages that they would not be studied in isolation.

General Aims of the Programme

The programme:

- fosters in each child a knowledge and understanding of different value and belief systems in an atmosphere of critical enquiry and mutual respect
- prepares children to become caring members of a multicultural society with the necessary intercultural skills to enrich such a society
- addresses issues of spirituality and morality
- facilitates in children the ability to make reasoned and informed moral judgments
- supports children in cultivating their individual spirituality in a secure environment
- raises awareness in children of issues of human rights, justice and equality in society
- develops in children an ethical and reasoned approach to caring for the environment
- provides children with a range of dispositions and skills to enable them to participate in and contribute to the democratic process and become informed, socially responsible and fair-minded citizens.

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

Putting the Curriculum into Practice

Four key principles underpin the delivery of the Ethical Education Curriculum.

- The curriculum should be delivered in the context of a caring and inclusive school ethos.
- The support of parents/carers in the overall development of the child should be recognised at all times.
- The curriculum should be delivered as part of an integrated cross-curricular approach within the school.
- Discrete time should be made available for the delivery of the curriculum.

In order to provide opportunities for the exploration of issues raised in the Ethical Education Curriculum, schools provide space for children to:

- reflect and experience a sense of awe and wonder
- express their opinions in a safe environment
- search for meaning and purpose through a study of issues that emerge in their lives such as grief and loss
- grow in self-knowledge through opportunities for reflection and quiet time
- debate, investigate, imagine, predict, record and critically analyse issues
- explore class and school incidents such as bullying, name-calling and exclusion through the use of the values that are implicit in the Ethical Education Curriculum
- engage in positive action to address issues of equality and environmental concerns.

The Role of Parents and Carers

This programme recognises parents and carers as the primary educators of their children. As part of the process, they are encouraged to engage with their children in developing their knowledge, skills and attitudes around the four strands of the curriculum.

As partners in the education process, they are invited to formally participate in the programme and validate its aims and objectives.

Each strand lends itself to the involvement of parents and carers and the individual teacher decides the best way of making this involvement beneficial to the learning environment for children and a positive experience for all concerned.

The Strands

STRAND: Moral and Spiritual

The general aim of the strand is to help develop in children a critical knowledge, understanding and awareness of right and wrong and a heightened awareness of

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

social, ethical and moral standards through reflecting on the meaning and purpose of life. The strand should encourage and develop the individual on the journey to inner discovery and empower the child to make informed moral decisions.

Strand Units: Exploring Moral Development; Cultivating Spiritual Growth

STRAND: Equality and Justice

The general aim of this strand is to develop in children a critical knowledge, understanding and awareness of issues relating to human rights, equality, culture and diversity, social justice and social inclusiveness and to empower them to make a difference.

Strand Units: Exploring Human Rights, Promoting Equality, Exploring the Democratic Process and Activating Equality through Positive Action.

All of these strand units overlap and are strongly interlinked.

There are strong integration possibilities and links in this strand with many aspects of the national curriculum. i.e. with English, Personal Social Health Education (PSHE), Geography, History and programmes such as the “Rights Respecting Schools Award” (RRSA) and “Spiritual and Emotional Aspects of Learning” (SEAL).

STRAND: Belief Systems

The general aim of this strand is to develop in children a critical knowledge, understanding and awareness of the teachings of religious and non theistic belief systems and how these systems relate to our shared human experience. The emphasis will be placed on an exploration of the infinite variety and richness of humankind through nurturing a respect for a person’s right to hold and practice individual belief systems and through creating spaces where values can be articulated and critically examined.

Children are encouraged to develop an understanding of the right to hold and practise differing beliefs and what it means to live in a world of diverse beliefs. Throughout this strand it is essential that the right to be different, have different views and not to necessarily belong to a specific belief or philosophical group is respected. In particular, in studying belief systems, it is essential that the non-religious perspective is equally respected and acknowledged. For this purpose, Educate Together schools often acknowledge a category of “personal creed” for those children and families who are reluctant to be identified with a particular grouping.

Strand Units: Introducing key figures in the major belief systems; Exploring the rites and ceremonies associated with a variety of belief systems; Exploring the important celebrations associated with such belief systems; Encountering the philosophy and

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

values of the major belief systems

There are strong integration possibilities with this strand and a range of other curriculums such as Literacy, History, Music, Geography and Art. It is not envisaged that this strand will be studied in isolation from the other three identified strands. Each strand should inform the study of the other three and this is particularly relevant in the delivery of this strand.

STRAND: Ethics and the Environment

The general aim of this strand is to develop in children a knowledge, appreciation and respect for their environment and to empower them to take an active role in its stewardship.

Strand Units: Knowledge and awareness of environmental issues; Activation of responsibility and stewardship.

This is a comprehensive curriculum for ethical education for children in the primary age range. It is the product of extensive testing over many years in many diverse school settings. This has covered the educational experience of children as young as four and as old as 13.

Educate Together believes that a programme of ethical education is a core requirement in modern educational practice. It matters not where the programme of education takes place, all children need to be empowered to become confident and knowledgeable global citizens. The modern world requires them to manage many new demands. They need to be self-aware. They need to be able to manage rapid change. They need to be empowered to have a happy productive life in a world of rapid change, many choices and great diversity.

We consider that this curriculum fully meets the statutory requirement to deliver on “British values” and to counter radicalisation, extremism and prevent the growth of hostility or hatred based on political, racial, ethnic or religious attitudes.

Incorporating into the National Curriculum

Our schools fulfill the aims of the UK curriculum to provide a broad and rich education, setting high expectations for all. We integrate most subjects with the values and objectives of the Learn Together curriculum whilst appropriately emphasising the discrete nature of the subjects specified in the national curriculum. All pupils are taught the full curriculum needed to be secondary ready with a focus on diminishing divisions.

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

The UK National Curriculum

We teach the National Curriculum both alongside and through the Learn Together curriculum. We prepare the children for all the standard assessments and tests as required by the DfE and teach them to read and write and be confident in maths so that they are secondary ready. We see this as a cornerstone of our curriculum and teaching methods.

Pre-School/Reception

The Learn Together curriculum will be taught alongside the EYFS curriculum and our current practice shows that this works very well. The Pre-school and Reception team will work together to ensure a cohesive and challenging curriculum for all age groups. Children will have the opportunity to learn through a play-based approach which caters for the range of abilities and needs within the class. Planning will be done in accordance with the EYFS curriculum and development matters to ensure easy transition from Pre-school into Reception, encompassing the prime and specific areas of the curriculum:

- Personal, social and emotional development
- Communication and language
- Physical development
- Literacy
- Mathematics
- Understanding the world
- Expressive arts and design

Children will have the opportunity to explore, interact and learn both within the indoor and outdoor classroom. They will be encouraged to become inquisitive, independent learners who are involved in making their own decisions and staff will work to develop the foundations for their future education. Pre-school and Reception children will have daily phonics sessions in line with Letters and Sounds to support and develop their early reading and writing skills.

Pre-school provision

We follow the local admissions policy to provide education for all that is equal, non-selective and based on siblings, SEN, LAC and proximity to the school. We aim to provide the local authority funded spaces to meet the needs of working parents and will look at provision for disadvantaged 2 year olds in the future although this offer may be dictated by the final building design. [REDACTED]

[REDACTED]

[REDACTED]

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

The EYFS curriculum is followed and we will have at least one fully qualified teacher. This setting will be managed by the Early Years Lead.

SEND/Pupil Premium/EAL/LAC

The equality principle defined in the Educate Together model is relevant to those children with additional needs as it ensures that the school will strive to provide them with full access to the curriculum equally and to enable them to join in all activities.

In line with good practice, we assess all children on arrival, liaise with their previous setting or school and plan a comprehensive induction so that we cater for their needs. For children already in the school regular assessment, meetings with other staff, the Head, the SENCO and parents identifies early on those who need additional support either in school or from external agencies. It is of high importance to identify these needs as early as possible so that children do not fall behind. We buy in support from Speech and Language, ASDOT and similar and from LA SEN support workers etc. to provide support and advice for staff in appropriate strategies.

We welcome all children whatever their needs and this is a particular strength of the ethos of an Educate Together school. This ethos, we have found, helps prevent the sorts of nurture issues that are becoming more common in schools today. We have built into our staffing model the provision of specific support for this and for families should it become necessary. We have staff in Educate Together who are Thrive trained (a nurturing intervention programme) who will supply support to the staff of the new schools if necessary.

We find that parents of children with special needs welcome our inclusive ethos and other families actively support it. We have also found that such an approach benefits all children. We work closely with the Local Authority and other agencies in child protection and SEN.

New arrivals and Transition to Secondary School

Our experience shows that the children have a high level of ownership of the school and curriculum therefore are actively involved in helping new children when they join us. The children guide them and support them in the systems, procedures and rules of the school. This works far more effectively than a top down approach.

For EAL and SEN children we have an induction programme delivered by trained staff to ensure their needs are met and an individual plan is quickly put in place. When children leave, this information is passed on to other schools promptly. We engage with local school networks and clusters to ensure all children have enrichment days and cross school activities. This is particularly useful for Gifted and Talented or AIM children

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

(able, interested and motivated).

Children will be supported in their transition to secondary or other schools. We will work closely with local secondary schools to ensure that the children are prepared as well as possible for the next stage in their education. This is through regular visits, joint moderation, sharing of Year 6/7 projects and working closely with our cluster schools. Taking part in events at secondary schools is equally important. As an example of our approach in this area, in Redfield, one of our Academy Development Council members is currently a member of the SLT at our nearest secondary school.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

D2 – measuring pupil performance effectively and setting challenging targets

Measuring pupil performance effectively and setting challenging targets

Assessment

All assessments whether baseline, tests or teacher assessment are used to modify teaching so that children reach expected outcomes, or better, by the end of the year and key stage. This assessment draws from a range of evidence of what pupils know and understand and can do in the different areas of the curriculum. Teachers make consistent judgements and share them with each other, for example across a year group, within a subject and between adjacent year groups. Staff also work alongside other schools to moderate, to maximise accuracy and to ensure that the school's judgements are in line with other schools.

Baseline Assessment

We currently use the EYFS National Baseline Assessment alongside our own baseline assessments using development matters to assess children on entry into Reception as

D2 – measuring pupil performance effectively and setting challenging targets

well as the EYFS framework. From this we plan next steps accordingly. We use observations in the children's learning journeys on the online learning journal "Tapestry" to carry out formative assessment. This is done on a daily basis and is used to inform planning for provision based activities. Children are informally assessed during weekly literacy and maths lessons to support teacher judgements and inform next steps. Marking of adult led activities is done with the children to identify elements of their learning that they have done well and also to inform them of what they can do next in their learning.

Staff use summative assessment at the end of Autumn, Spring and Summer to track children's progress in all 17 areas of their learning. We work with cluster schools to moderate learning and assessments and ensure our judgements are accurate. We also use an early years specialist external School Advisor to validate and provide a national context. At the end of reception, children are all assessed against the ELG's and external moderation is used to validate staff judgements.

Years 1-6

We follow the National Curriculum and use the assessment descriptors for Key Stages 1 and 2. Staff mark with the children and give verbal and written feedback as part of an on going assessment process. Teachers and teaching assistants are actively involved in assessment to ensure the child's achievements and areas for development are clear.

Summative assessment is carried out three times a year and results are currently input into the "Target Tracker" EES for Schools system. Target Tracker is then used to track progress against the objectives, which are set in line with our local cluster of schools. This means that teachers can meet regularly to moderate with each other and ensure rigour at all times. Our new schools work within this framework.

The process of assessment will reflect the learning needs of the children and will provide opportunities for parent/carers to engage in the process. The formative approach to assessment provides on going feedback not only to the teacher, but also to the child and parent/carers through critical reflection on key issues that have been studied in the curriculum.

Teaching and Learning Evaluation

At Educate Together we believe that the most important role of teaching is to promote learning of the Educate Together ethos, the Learn Together Curriculum and the National Curriculum, the acquisition of skills and knowledge by pupils and to raise achievement.

Expectations

In arriving at an evaluation of the overall quality of teaching and learning through the school, we consider the strengths and development needs of teaching and learning

D2 – measuring pupil performance effectively and setting challenging targets

observed across the broad range of activities. Our schools do not evaluate the quality of teaching simply based on individual lesson observations, learning walks or equivalent activities; rather we will use this monitoring, along with other evidence of pupils' learning and progress over time, to discuss developments required with staff. The other evidence we use includes pupils' work in their books and folders, how well pupils can explain their knowledge and understanding of subjects, pupil and parent views as well as outcomes in tests.

Teaching's effectiveness depends on the impact of the quality and challenge of the work set. Colleagues assessing teaching look at how well pupils acquire knowledge, learn well and engage with lessons.

At our schools we evaluate the use and contribution of teaching assistants to learning alongside that of teachers. We encourage the professional development of teaching assistants and have a track record for providing career paths into teaching for those who desire it.

Teaching Philosophy

- teaching engages and includes all pupils with work that is challenging enough and that meets the pupils' needs as identified by teachers through formative and summative assessment
- teachers have the respect of their classes, set out clear expectations for pupils' behaviour in line with the Educate Together ethos, start and finish lessons on time and manage teaching resources effectively
- pupils' responses, in lessons and over time, demonstrate sufficient gains in their knowledge, skills and understanding, including the Learn Together curriculum, literacy and mathematics
- teachers monitor pupils' responses in lessons and adapt their approach accordingly
- teachers seek to assess the effectiveness of their own teaching and adapt accordingly
- teachers routinely give the necessary attention to the most able and the disadvantaged, as they do to low-attaining pupils or those who struggle at school
- teachers set home tasks in line with the school's policy and that challenges all pupils, especially the most able
- assessment is frequent and accurate and is used to set challenging work that builds on prior knowledge, understanding and skills
- pupils understand well how to improve their work
- teaching helps to develop a culture and ethos of progress, where the highest achievement in academic and non-academic learning is recognised
- teachers have high expectations of all pupils
- teaching across the school prepares pupils effectively for the next stage in their education.

Assessment

- any baseline assessment, teacher assessment and testing are used to modify

D2 – measuring pupil performance effectively and setting challenging targets

teaching so that pupils achieve the expected standards by the end of a year or key stage

- assessment draws on a range of evidence of what pupils know, understand and can do in the different aspects of subjects in the curriculum, for example through regular testing
- teachers make consistent judgements and share them with each other within a subject, across a year group and between adjacent year groups.

Evaluating learning over time

A range of evidence over time will be used to evaluate what teaching is typically like and the impact that teaching has on pupils' learning over time. This includes:

- pupil discussions about their learning
- discussions with teachers and TAs and other staff about teaching and learning
- views of parents, pupils, staff and other professionals
- scrutiny of pupils' work

Teacher feedback

At our schools we intend feedback to be a pedagogical dialogue between professionals. This is seen as a reflective process with the aim of improving teaching and learning outcomes for children. This discussion will focus on self-evaluative reflection on the strengths and weaknesses of a lesson and aims to identify an area to be developed. There is follow up (peer review, drop-in, observation, video or similar) within two weeks to evaluate progress.

Action research

At our schools we actively encourage action research and innovation. We recognise we all learn when we are well supported, encouraged and are able to take risks and learn from mistakes. Self evaluation, peer evaluation and reflection is rigorous, robust and focussed on improving learning for pupils and the school development plan. We encourage the professional development of staff through research and support innovation and trialling well-considered ideas.

Attendance and Behaviour

We will closely monitor this and will, as necessary, buy in support from the Educational Welfare Officer to ensure we maximise attendance and punctuality. We monitor behaviour regularly having policies and systems drawn up in close consultation with parents and the children.

Reporting to parents

Staff will report regularly to parents both informally and formally. This is done in a variety of ways such as parents evenings three times a year, written reports three times a year, regular briefing and feedback meetings e.g. on phonics, SATS tests, reading, maths techniques and other curriculum input. Parents are also welcomed to drop in

D2 – measuring pupil performance effectively and setting challenging targets

after school to meet the teacher.

In the mornings there will be regular activity mornings for parents (several times a week) where the parent is invited into the class first thing to work on a variety of tasks with their child such as reading, maths games and so on. In Redfield, these are very popular with over 80% uptake most mornings and we expect that this response will be repeated in all our new schools.

Parents will have access to online information entered on a learning platform about their child and they in turn can enter information for their child for the teacher to see and use to enhance the child's learning.

School Improvement, quality assurance and establishing and maintaining high standards

In order to ensure consistency of teaching and learning and high standards and expectations the [REDACTED] will carry out quality assurance and report to the [REDACTED] will have responsibility for oversight of KPIs, the development of the ethos and curriculum and pupil progress and attainment. Whilst schools have the same approach to the ethos and values of Educate Together and to teaching and learning, they are encouraged to develop their own identities in partnership with their families and local community. There is no intention that each school is identical. Targets setting is robust and relevant, challenging all to achieve to the maximum of their ability.

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

Underperformance and slow/falling standards

Our Quality Assurance and School Improvement Team [REDACTED] [REDACTED] monitor teaching and learning closely in partnership with the school. Should indicators suggest there is a risk area the team will provide early intervention - staff support such as coaching, team teaching, planning guidance, training opportunities and mentoring. This team will also work closely with the Headteacher to provide staff development and advice. Action plans will be drawn up in partnership with all parties and the implementation of this will be monitored by the Head and [REDACTED] [REDACTED]

Schools will work both within Educate Together and with external schools and other

D2 – measuring pupil performance effectively and setting challenging targets

providers to provide a rich and challenging series of development opportunities and best practice.

We carry out all external statutory tests and benchmark against other schools both locally and nationally. We buy into local Authority school improvement systems when appropriate. We take a full and active role in local moderation and benchmarking exercises.

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

Full Staffing structure – Abbey Farm (two form)

Year of operation	Admin	Teaching	SLT	Support	SMSAs	Site
Year 7 460 2024 Y6	SBM - FT Admin FT .8 FO	14 x class teacher 2* PPA FT Tchs	Headteacher FT Deputy Head FT 3 x Phase ldr LS1-5 F FT SENCO	10.5 x HLTA 1 x TA (SEN) .5 TA (EAL) 1 FT FSW	6 x play workers 1 x play leader	Cleaners 35 hrs Caretaker FT Catering x 3
Year 6 400 2023 Y5	SBM - FT Admin FT .6 FO	12 x class teacher PPA FT Tchr	Headteacher FT DH LS 8-13 FT 3 x Phase ldr LS1-5 F SENCO .5	10.5 x HLTA 1 x TA (SEN) .5 TA (EAL) .8 FSW	5 x play workers 1 x play leader	Cleaners 30 hrs Caretaker FT Catering x 3
5 th Year 340 2022 Y4	SBM - FT Admin FT .4 FO	10 x class teacher PPA FT Tchr	Headteacher FT DH LS 8-13 tchg .5 2 x Phase ldr LS1-5 FS FT tchg SENCO .4	9.5 x HLTA .5 TA (SEN) .5 TA (EAL) .6 FSW		Cleaners 25 hrs Caretaker FT Catering x 3
4 th Year 280 2021 Yr3	SBM - FT Admin FT	8 x class teacher 1 PPA Tchr	Headteacher FT DH LS 8-13 tchg.5 2 x Phase ldr FT tchg .5 FS/1, 2/3 SENCO .3	8.5 x HLTA .5 TA (SEN) .5 TA (EAL) .5 FSW	4 x play workers 1 x play leader	Caretaker .5 Catering x 3
3 rd Year 220 2020 Y2	SBM - FT Admin .6	6 x class teacher .6 PPA Tchr	Headteacher FT 2 x Phase ldr LS1-5	7.5 x TA .5 TA (SEN)		Cleaners 20 hrs Caretaker .5 Catering x 3

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

			FS-Y2 FT tchg SENCO .2	.5 TA (EAL) .5 FSW		
2nd Year 160 2019 Y1	SBM - FT Admin .5 BG8	4 x class teacher .5 PPA	Headteacher FT Phase leader FT tchg SENCO .1	5.5x TAs FT	3 x play workers 1 x play leader	Cleaners 17 hrs Catering x 2
1st Year 80 2018 Reception 60+ Nursery +20	SBM - FT Admin .4	3 x class teacher PPA .2	Headteacher FT /SENCO) Phase leader FT tchg SENCO .1	3 x FT TAs BG.8	3 x play workers	Cleaners 15 hrs Catering x 1.5

Please note that these structures are based on full take up of available spaces. They may be adjusted to meet actual demand.

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

Expertise of Educate Together Staff

We use our teachers both in the UK and Ireland to induct and develop new staff. All teachers spend time in Educate Together schools to fully understand the curriculum and the ethos of an Educate Together school.

SLT from our existing UK school will provide support and there will be joint professional

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

development and regular visiting of each other's schools. We have staffed the schools to allow for this and are already taking in students so that we can begin to grow our own expertise. We also work closely with cluster schools for shared CPD and for development opportunities. Other schools in our cluster have much expert advice available. We also work closely with the Local Authority advisors e.g. Speech and Language, Educational Psychologists, EWOs, curriculum advisors. We work with local teaching schools and with Heads groups to provide support as required and share good practice.

Qualified Teachers

All our nursery provision will be led by a qualified teacher as we only employ qualified teachers to teaching roles throughout all year groups. All our teaching assistant roles are offered as HLTAs to ensure we get the highest quality and the best results for our children. We have provided costings that show this is viable within the funding available. As a Trust we plan to apply to be a Teaching School so we can train our own staff and we expect that this will be in partnership with local universities.

If income drops we would make savings elsewhere before we reduce staffing. We believe we have built in enough flexibility to ensure affordability even in a slight budget reduction.

Recruitment

We are attracting very strong fields for vacancies of all staff as our ethos is attractive to teachers and support staff. This is also because of our strong ethical curriculum, our reputation and because we offer excellent professional development for teachers and TAs.

Work recreation balance is an important part of our ethos and our democratic process ensures all staff can make their voice heard.

During the pre-opening phase recruitment is a core activity, starting with the recruitment of the Headteacher. Following this appointment all roles are recruited to a schedule. The Headteacher is responsible for the balance of staff required with the Shadow Academy Development Council providing a member of the recruitment panel.

To promote local jobs for local people, without compromising our 'blind' recruitment procedure, we are committed to open communication about recruitment timelines and job roles: we will make information available at stakeholder events and will promote vacancies through a variety of local and social media. In this way we hope to increase the number of local applicants. Further information about recruitment and consultation can be found in section F.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

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

Equality of access

The fundamental legal concept behind Educate Together’s sponsorship is that an Educate Together school is legally obliged to operate the school to deliver equality of access and esteem to all children, irrespective of their social, cultural or religious backgrounds

This very simple idea is the foundation of all policy and practice in our schools, whether it is the admissions policy, the way that the Trust, Academy Council and staff carry out their work, the way that children, parents and staff are treated, the way that a code of behaviour is developed or the manner in which the curriculum is delivered.

In its operation as a school sponsor, the Trust has set itself legally binding principles which determine all its activities. These principles are that all its schools and educational operations must be: **Equality based, Co-educational, Child-centred and Democratically run.**

It is important to note that these principles are not ‘mission statements’ or merely statements of aspiration or intent. They form real commitments to deliver an education that reflects these binding principles. The Board of Directors of the Educate Together Trust, the Academy Council of an Educate Together school, its Head and staff must judge their performance against these core principles at all levels.

The educational aim of this work is to model positive information about the diversity of humanity in a respectful atmosphere that highlights rights and responsibilities.

This approach has a number of consequences:

When this model of school ethos is conscientiously implemented, no child is ever placed in a position in which they feel themselves an outsider in the school programme because of their family or individual identity. The approach minimises the situations in which parents or children feel the need to remove themselves from aspects of school life. It maximises the school’s ability to address the religious rights of all families without

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

favour or discrimination.

Responsibility for religious or philosophical formation of children is assumed to be that of the family and, if relevant, religious organisations, while the responsibility of the school is to provide a safe, caring and respectful environment for all children. This encourages children to have a strong and secure contact with their own identity and comfort in interaction with people of different faiths and persuasions.

The human rights of teachers and other workers in the school are addressed, as staff are never placed in a position in which they may be required to put forward as religious truth a viewpoint that they may not themselves hold.

Whilst Educate Together holds that this way of treating religious difference in a school context offers many advantages, we appreciate that there are families for whom this model may not be suitable.

For instance, an Educate Together school depends on parents who are happy to allow their children to explore and be exposed to different religious and philosophical views and who do not regard it as their religious duty to seek to impose a particular viewpoint on others. If raised, an Educate Together school will attempt to handle these issues as sensitively as possible and engage with the families involved. However, in the case of families who observe strict prohibitions around their children's exposure to artwork, games or sports of other faiths, a religious school of their conscience, or a recognised programme of home education may well be a more appropriate choice.

From an educational perspective, the inclusive nature of the Educate Together ethical programme permeates and influences all teaching in the school. Children are encouraged to gain personal understandings in a creative and supportive learning environment. They are encouraged to evaluate information, form judgements and articulate these judgments in a supportive, respectful and safe environment. Educate Together schools promote an approach to education which is based on the core values of mutual respect, self-esteem, dignity and critical awareness.

The child is formally recognised as a participant in the education process and a valued part of the learning organisation that is Educate Together. Participation in school affairs and listening to the voices of the children is part of the democracy that underpins the school. This core value of partnership aims to nurture a deep appreciation of the concepts of participation and rights in society, organisations and the world.

The approach taken to ethical education in Educate Together schools aims to directly promote the life skills that are essential to a generation of children, growing up into a diverse and varied social environment. Their adult experience will be genuinely global in scope.

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

The equality principle

Educate Together schools are committed to the principle that children of all backgrounds should be equally respected in all operations of the school. This definition embraces the family of the child and includes social class or wealth, culture and ethnicity, ability, gender and religious or philosophic viewpoint. This principle starts from the standpoint that no child chooses their family and every child has an infinite potential to progress. No child should be unfairly discriminated against in school. In religious terms the definition includes those of humanist, agnostic and atheistic viewpoints and a generic concept of 'personal creed'.

The term 'respect' is carefully chosen. There is a clear distinction made between the concept of accommodation and tolerance of difference and the concept of respect. Tolerance and accommodation inherently imply that a majority view must make allowances for minority views and minorities must make requests to achieve this accommodation; respect implies care and equal treatment as of right.

In practise, the objective of an Educate Together school is to create a school culture in which the identity of every child is guaranteed active support. Neither the child nor parents or guardians should have to ask for that respect to be given and no child or family should feel that they are an outsider. The school works hard to create a positive, comfortable and kind atmosphere. The underlying concept is that human diversity enhances life, enriches cultures and provides huge educational resources for current society and for its future social, cultural and economic prosperity.

Many aspects of our core curriculum fit under the aspects of SMSC (see section D1) and PHSE. As mentioned earlier, we consider that this approach prepares children for modern life in Britain and the world. Several areas cover the core British values as set out by the government. These include democracy, equal opportunities, the rule of law, individual liberty and respect. Children are encouraged to debate and discuss these in an open and respectful way, valuing the views of others even if they hold different opinions themselves. This falls mostly in the Equality and Justice Strand of our ethical curriculum but the spirit and values permeate the whole school environment.

Co-educational

The co-educational principle obliges an Educate Together school to work to ensure that all children are empowered to fulfill their potential irrespective of gender and other stereotypes.

Co-educational education is far more than simply putting girls and boys into the same classroom and teaching them the same curriculum. Instead, it should ensure that the school develops a comprehensive programme to counter gender stereotyping in all its forms. Schools should be proactive in promoting an approach to learning that encourages and supports the wide variety and range of talents among the children

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

irrespective of gender.

This is a complex issue that a school cannot solve on its own; nevertheless it must be addressed and discussed within schools in partnership with parents, teachers and students. The significance of this element of a school's work should not be underestimated. The rebalancing of gender roles based on equality and respect is central to the growth and development of society and Educate Together is committed to ensuring that children are given every opportunity to explore and develop an equitable approach to gender. Active combating of gender-based discrimination and encouragement of children of both sexes is an important part of the 'school plan' in an Educate Together school.

Child-centred

This principle ensures that the approach to teaching and learning in an Educate Together school is based on the educational needs of the children of the school. The teaching staff are required to observe and analyse these needs, devise appropriate lessons and activities to address them and to be accountable for the success of their teaching. In other words, Educate Together schools do not simply teach to the test. They teach to the needs of children which in many cases are far beyond the levels set by standardised tests and are always much broader.

This principle means rather more than the definition of a teaching philosophy. It defines another element of policy formation. It obliges the school to take decisions primarily based on the broad educational and developmental needs of the children over and above other external factors.

This for instance, would influence decisions on opening hours, school holidays, code of behaviour and allocation of funds. Many of these decisions involve striking a balance between conflicting obligations. Nevertheless, this aspect of Educate Together's legal obligations ensures that the needs of the children decisively influence the decision-making process. It should be noted that we refer to the "children of the school". A school is a collective organisation that strives to address the individual needs of every child. However, any school must balance these needs with the general interests of all the children.

Democratically-run

Educate Together schools base their operations on high levels of parental and community participation. Our experience, and a wide range of international research shows, that a child's education is deeply affected by the influence of their family and factors outside school. The more a school engages a child's parent or carer and the community from which they come, the better the school works and a huge level of 'added value' can be accessed. As a sponsor, Educate Together facilitates this process

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

and empowers those involved. We expect our schools to model a constructive partnership between the involvement of parents, carers and the wider community with the teachers in the school that positively affirms their professional role.

Prevent Duty

All staff will be trained to meet the needs of the Prevent Duty. We already have a member of staff in Bristol trained as a [REDACTED]. Our curriculum is aptly suited to help children develop resilience to extremist views and actions. Children in our schools are encouraged to have high self-esteem, self worth and questioning and analytical abilities, which helps guard against indoctrination. We have delivered training to other schools on putting Prevent into practise and providing the right environment so children do not become vulnerable to extremist views.

Safeguarding and Welfare

Staff will be trained regularly in all the aspects of safeguarding and receive regular updates to take into account areas such as FGM and child abuse. The Academy Council will engage with this regularly and carry out audits. Our schools have very close links with Local Authorities and Safeguarding Boards to ensure we have robust procedures. All our current procedures have been externally moderated and, of course, have been approved as part of the pre-opening Ofsted inspection for our first school. They will be reviewed for the specific requirements of these two proposed free schools in the context of their own pre-opening inspections.

Religious ethos and curriculum

The general aim of our specific Belief Systems strand is to develop in children a critical knowledge, understanding and awareness of the teachings of religious and non-theistic belief systems, including humanist and atheist philosophical viewpoints and how these systems relate to our shared human experience.

The emphasis will be placed on an exploration of the infinite variety and richness of humankind through nurturing a respect for a persons right to hold and practise individual belief systems and through creating spaces where values can be articulated and critically examined.

Throughout this strand it is essential that the right to be different, have different views and not to necessarily belong to a specific belief or philosophical group is respected. In particular, in studying belief systems, it is essential that the non-religious perspective is equally respected and acknowledged.

We cover “British Values” as defined by the department as part of the core values that are central to our curriculum, as you will have seen above.

We have found both in the UK and Ireland that the schools are greatly oversubscribed by all backgrounds and communities as many people, regardless of faith etc., wish their

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

children to learn about all peoples in their country. Our existing UK school has a very diverse make up and our popularity has arisen through word of mouth in all communities. In Redfield we have had no withdrawal of children from any activity on religious or ethnic grounds. These have included school celebrations and assemblies marking Christmas, Eid, Diwali, Lantern festivals or summer solstice parties.

Assemblies

In an Educate Together school we have daily assemblies of about 20 minutes where we discuss our value of the month and mark social and cultural celebrations or religious events. Time is set aside here for reflective time. We also include reflection time, thought corners and displays throughout the year groups. So far in the UK, there has never been a request from parents to withdraw a child from activities. We believe that this is largely because we make it very clear that every child's identity is respected equally. We find that families choose our schools because of our broad outlook and because they know how it is important for their children to learn about this for their future in a rapidly changing, diverse and global economy.

Uniform/Dietary needs

Uniform is not specified with families able to reflect their culture and beliefs in how they dress their children. We believe this is a fundamental part of a child expressing their values and individuality.

All children share cooked dinners and the varied menu has options for all dietary and faith requirements. Mealtimes together, as a family with staff as well, is a fundamental part of our approach to "learning together to live together" and our core commitment that no child should feel that they are an outsider.

Staff Appointments

We welcome staff from all faiths and all cultures and beliefs. The only proviso is that they must feel able to fully join in all aspects of the curriculum and school life. As we expect all to respect their identity, we expect them to respect others.

Creationism: Evolution is taught as the most reliable scientific explanation of the development of the natural world. Creationism is mentioned only in the context of information provided in the Belief Systems strand of our curriculum.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

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

Need for new primary schools: Abbey Farm [REDACTED]

Educate Together has undertaken detailed discussions with Swindon Borough Council (SBC) to ensure our applications meet the needs of the Borough. We are pleased to provide a letter of support from Swindon Borough Council (Annex A).

1. Places and Standards: City-wide Need

SBC has plans for the necessary increase in school provision by 23 - 25 forms of entry by 2026 (Swindon Place Planning Study 2016: 9). The building of a planned 21,400 new homes will require a significant school building programme as detailed in The Place Planning Study. This study will be referred to throughout and is available here: http://www.swindon.gov.uk/downloads/file/2279/swindon_school_place_planning_study_update_2016

Primary and Secondary School Place Needs from new development Location	Housing No's	School Place Needs Forms of Entry (FE)	Methodology
[REDACTED]	1695	1.86	(1695 x 0.033)/30
[REDACTED]	4064	4.47	(4064 x 0.033)/30
[REDACTED]	4511	4.96	(4511 x 0.033)/30
[REDACTED]	890	0.98	(890 x 0.033)/30
[REDACTED]	1650	1.81	(1650 x 0.033)/30
[REDACTED]	8000	8.80	(8000 x 0.033)/30
[REDACTED]	140	0.15	(140 x 0.033)/30
[REDACTED]	450	0.5	(450 x 0.033)/30
Total	21,400	23.54	

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

Table: Swindon Place Planning Strategy 2016:17 . *The Place Planning Study is still the draft version.

1a. Places: need for a new 2FE Primary School at Abbey Farm

SBC confirms the need for a 2FE primary school and pre-school, at the [REDACTED] [REDACTED] to meet the anticipated shortfall in places: 370 houses are planned for the [REDACTED] in addition to several surrounding pockets of development with housing yields of 100 -150 houses each.

“A second primary school in [REDACTED] will cover the majority of the extra places that will be needed from the large housing developments, but an additional 2FE school will be required at [REDACTED] meet the demand generated from smaller infill developments in [REDACTED], especially around [REDACTED].” (Swindon Place Planning Strategy 2016:8.22, page 26)

Information from Swindon Borough Council suggests the school is needed from September 2019 or September 2020.

Abbey farm – Additional nursery places

In addition to primary places, Swindon also has a predicted 670 shortfall of nursery places by September 2017. 515 of these places are in Abbey Farm, from September 2017, increasing to 670 places once those with an entitlement to 30 hours are included. A shortfall of 188 places for funded 2 year old places is also projected for 2017.

The Local Authority states “The creation of maintained nursery provision is essential, both for 3 and 4 year olds and 2 year old funded children, as part of the proposed free school within the Abbey Farm development.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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

[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]

2. Standards: Abbey Farm and Commonhead

Existing primary schools within the Abbey Farm and Commonhead localities are categorised by OfSTED as either good or better. We offer a new ethos with excellent results, to compliment the existing strong network of schools and to deliver on aspirations set by Swindon Borough Council.

We will be active in local cluster groups and seek to collaborate with many schools. Not only are we keen to learn from those within the community already, we seek to share the good practice found in our schools.

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

We are actively participating in educational research projects being undertaken in partnership with universities in the UK and in Ireland. We are keen to share and debate the knowledge and understanding that arises from such research with any interested parties.

2a. Standards: Local Schools Data near Abbey Farm school site

Nearby Schools	Miles from Site 1	Ofsted rating	FSM%	EAL%	SEN + %	2014 % Progress measures KS2		
						Reading	Writing	Maths
Bridlewood Primary	0.513 miles	2 April 2012	8.1%	11.5%	1.1%	100	100	89
Abbey Meads Primary	0.797 miles	2 Oct 2012	10.0 %	11.8%	1.7%	98	98	98
Red Oaks Primary	0.954 miles	2 Nov 2013	7.6%	14.3%	6.0%	96	96	95
Local average figures that may be applied to <i>Abbey Farm Educate Together</i>			8.6%	12.5%	2.9%			
National average			15.4 %	18.0%	7.7%			

[Redacted text]

[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]			

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

██████████	████ ██	████	████	
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3. Social Need

Educate Together offers the 'Learn Together' Ethical curriculum, not currently replicated in any Swindon schools.

Learn Together, which is taught both discretely each day and permeates through all aspects of school life, is significantly relevant to the areas of Swindon where we are targeting Free School applications.

Between 2001 Census and 2011 Census the most marked change in the Swindon Population has been in the decrease in those identifying as White British and an increase in those identifying as having Black and Minority Ethnic backgrounds. 82% of those younger than 50 years old are White British, a decrease from 92% 10 years earlier.

The relative lack of diversity within the existing population and the rapid influx of families to Swindon make it essential that the development of sustainable communities is given the highest priority, as recognised by SBC, in their focus on developing sustainable, healthy and supportive communities.

To ensure maximum pupil progress and development of the whole child, each child and their family must feel included, welcomed and encouraged to participate fully in the life of the school and in the developing community in which they live. The core principles underpinning *Learn Together* and the ethos of Educate Together are uniquely well suited to support these.

The rapid change in ethnic demography as a result of large-scale housing developments requires an education system that is responsive to the need for increasingly effective inclusion, community cohesion and understanding of how differences enhance rather than threaten communities. In 2011, 14.4% of those living within Abbey Farm locality identify as BME; for ██████████ the proportion is slightly higher at 16.6%. These figures are likely to increase rapidly as new housing is released in both areas and more widely across Swindon as a whole. The Educate Together ethos and *Learn Together* curriculum are uniquely well-suited to support the needs of the increasingly diverse communities.

Educate Together is highly experienced in community engagement and community development using and promoting the school building as a key local resource for the whole community. This project will be able to lean on the extensive experience of

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

Educate Together’s development team in Ireland. This team has successfully established over 70 schools in the last 15 years most of which are in in new highly diverse communities.

Abbey Farm benefits from lower levels of deprivation than the site for [REDACTED] Abbey Farm is currently in the least deprived 25% [REDACTED] Educate Together has much experience of engaging equally effectively with communities in deprived areas and in areas benefiting from advantage. We ensure every child and their family is valued and ensure no child or family feels an outsider.

4. Need for choice

SBC are keen to add variety to the area: an Educate Together school will add to the choice offered to parents of Abbey Farm and [REDACTED], which already enjoy a mixture of high achieving academies, Local Authority controlled schools and schools with a religious character. With our ethical education curriculum and deep commitment to equality and justice, Educate Together schools add further to this parental choice whilst offering an aspirational solution to the challenges of rapid development raised in the Swindon Local Plan.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

E2 – successful engagement with parents and the local community

Background

Housing in [REDACTED] is not yet underway: [REDACTED] However, the proposed schools will also draw students from existing housing around the new developments.

Swindon Borough Council made us aware of other providers submitting applications for both sites. To promote transparency and community choice, SBC approached the other

E2 – successful engagement with parents and the local community

providers, at our request to facilitate ‘market place’ events for local residents. The intention was to inform residents that their support could be given to a provider and to inform as many families as possible about the current system for free school application, ensuring all providers had an equal platform. Unfortunately other providers were reluctant to participate in a joint representation.

Due to the above our Public Consultation Plan has just been implemented with the launch of a landing page for each location on our website with a chance to complete an Expression of Interest form. Social media adverts will be placed periodically throughout the coming months to make families aware of the Educate Together’s educational model and our free school bids. Further consultation plans are listed below, by area.

Educate Together’s approach involves the creation of a “Shadow Council” in the period before the school opens. This grouping is comprised of local supporters and prospective parents and works on a voluntary basis to promote the aims of the school in the area, to assist the development team in local representations and to be a reliable consultation forum for the team when making policy decisions. A Shadow Council typically consists of five to ten members.

Abbey Farm

The [REDACTED] is not yet underway but the proposed school is intended to draw students from surrounding areas therefore much of the consultation work required will involve building strong working relationships with other education providers and stakeholders. Creating a sense of ownership and mutual respect throughout the process of community development is essential, as such we would instigate contact with the following groups:

- Residents/ Families in surrounding areas
- Local councillors
- Existing schools (primary and secondary) as listed in section E1.
- Early Years Providers
- The developers and contractors appointed
- Local businesses

Contact will be made through leafleting campaigns and meetings, social media and direct calls, as appropriate.

Through this process we will identify key stakeholders and potential Shadow Council members. Creation of the Shadow Council helps to give the local community a real

E2 – successful engagement with parents and the local community

sense of ownership of the school.

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

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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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)
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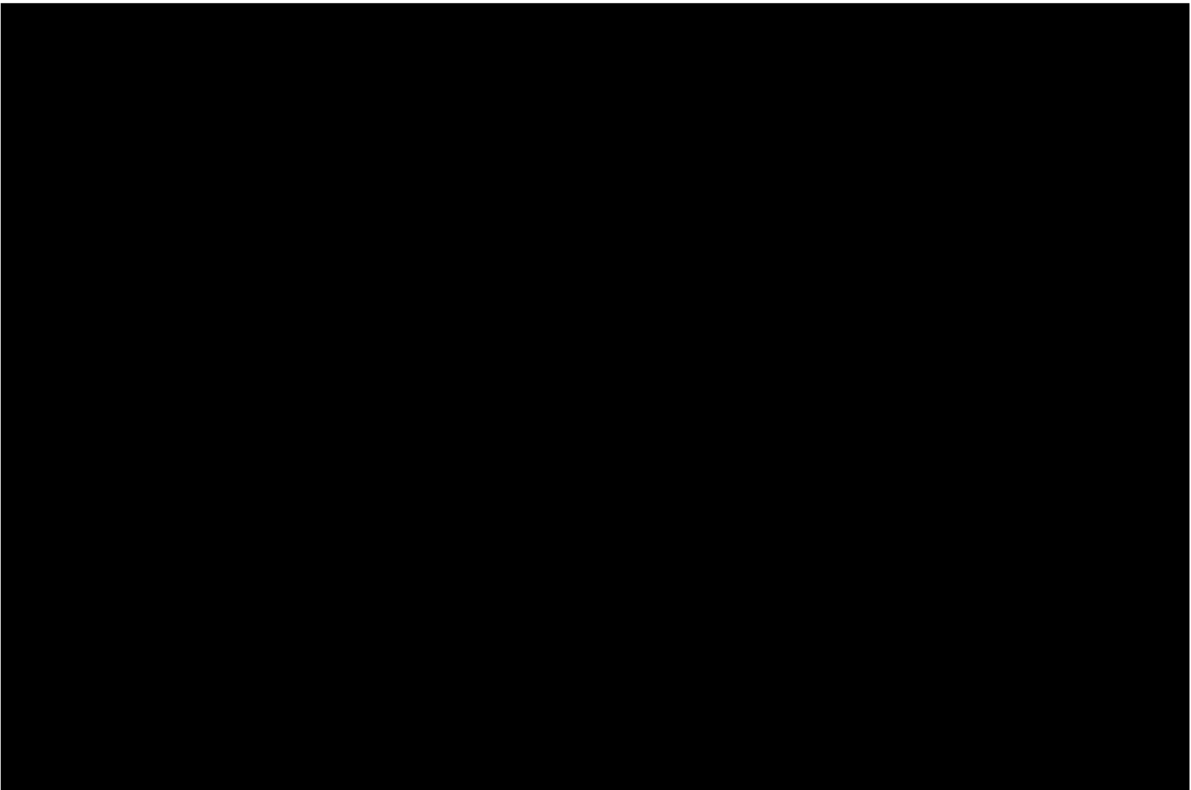
F1 (a) Skills and experience of your team

Throughout the pre-opening phase the [REDACTED] working with the Development Team will work systematically through the project plan, an example of which is shown below.

The plan covers all activities required to open the school including the establishment of the school governance, communication and stakeholder development, staff and pupil recruitment and curriculum planning.

Please note that the table below is a simplified extract of a project plan: Each school starts with a detailed project plan that acts as an evolving working document. Further detail can be provided at interview if required.

F1 (a) Skills and experience of your team



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 [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

Skills/experience missing	Where is the gap? i.e. pre-opening team, trustees, local governing body	How and when do you plan to fill the gap
<p>Local community engagement and knowledge</p> <p>Local governance and educational experience</p> <p>Local school network engagement</p>	<p>Local Academy Council for the new school</p>	<p>Will be recruited first as a Shadow Academy Development Council 1 year before school opens, then partly Trust nominated, partly elected to ensure a full and working range of skills.</p> <p>Current Academy Councils include: [REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>
<p>As detailed earlier, the Shadow Academy Development Council (SADC) will be formed prior to opening, following a series of public consultations. Stakeholder events have proved to be the most effective way to find representatives with a broad range of skills: At all events we will promote the structure governance and will actively seek appropriate candidates. Once stakeholder communication has been sufficiently developed we will advertise for members, running a selection process. Applications will be considered by the [REDACTED], who will seek to create a balanced skills set whilst representing different factions and viewpoints within the community. Selected members will then undergo an induction and a series of meetings designed to solidify the group as an effective board.</p>		

[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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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

Roles and responsibilities of trustees, members, committees and principal.

Educate Together Academy Trust is a company registered by guarantee, and an exempt charity regulated by the Department for Education. It has three members: Educate Together/Ag Foghlaim Le Chéile a registered educational charity in Ireland, [REDACTED]
[REDACTED]

In this document, Directors of the company are referred to as Directors rather than “Trustees” and principal teachers are referred to “Headteachers” or “Heads”.

The Members meet on at least an annual basis and elect the members of the board of directors, review fundamental progress of the Trust and especially its educational, ethical and financial performance.

The Board of Directors of the Trust meet at least six times per year and are responsible for the governance and oversight of all Trust operations. In particular, they appoint and hold accountable the [REDACTED]

The current composition of the Board and Directors’ areas of responsibility are as follows:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

The board has contracted the following professional services to advise it in the areas of Finance, Law and HR.

[REDACTED]

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

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It is the current view of the Members of the Trust that the board should not be larger than ten persons. This is to ensure efficient decision-making and accountability. The Members recommend that the board should create formal sub-committees to address specific areas of responsibility as the work of the Trust increases.

██████████ is responsible for all operations of the Trust. This currently consists of one growing primary academy, two active primary free school start-up projects due to open in September 2017 and the work of the MAT Development Team. The personnel involved in this team has been detailed earlier in this application. The MAT development team conducts research and prepares applications for new free schools. It identifies potential ‘joiner’ academies or schools who may be interested joining the MAT. It engages in dialogue in the media to promote the objectives of the Trust. It also participates in conferences and other forums to explore partnerships with other educationalists in the UK who may be interested in working with the MAT on ethical educational initiatives. In all this work, the MAT Development team has the advice and support of the National Office of Educate Together/Ag Foghlaim Le Chéile in Dublin.

In the case of this application, the MAT development team reports directly to ██████████ and through him to the Trust board.

The Development team will set up the two Free schools proposed. During the pre-opening phase, the team will work with the assistance of a “Shadow Council” in each of the target areas. This council consists of suitable supporters and prospective parents in the areas to be served by the school. As soon as possible, the Headteacher designate will work with this group. The Shadow Council will review all policy decisions in relation to the pre-opening phase.

Once the schools are opened, the development team will work with the Headteacher to establish an Academy Development Council (ADC). During this phase, the Headteacher is directly responsible to the Trust via ██████████ ensure that all statutory, regulatory, financial and legal obligations of the school are met.

The Academy Development Council (ADC) which will be set up post-opening will consist of:

- Headteacher
- teaching staff representative
- non-teaching staff representative

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

- male parent/carer rep
- female parent/carer rep
- two representative appointed by the Trust.
- This group of seven will then select two wider community representatives.
- The Trust will appoint a chairperson to the Development Council.

The Headteacher, school business manager and chair of the ADC will meet monthly to review the school plan and report to ADC and Trust board. The ADC will be trained by the Trust and will appropriately challenge and hold to account the Headteacher for the performance of the school. [REDACTED] is also directly accountable to [REDACTED] of the Trust.

At the end of the growth phase, the Trust board will devolve specific decision-making powers to the ADC at which point, the ADC will become the Academy Council with a regular term of three years. The Headteacher and Chair of the Academy Council will report directly to [REDACTED] of the Trust. [REDACTED] is assisted in this accountability, support and assistance to the new schools by [REDACTED] who is an experienced primary head with overall responsibility to lead Teaching and Learning throughout the MAT and [REDACTED] who is responsible for all Trust financial and administrative compliance, planning and accountability.

Conflict of interests

We have put stringent systems in place to ensure that Trustees and Board members and their families and associates do not benefit in any way from Trust or school transactions. They are not allowed by the Trust Memo and Articles and Trust policy to financially benefit or undertake paid work for the Trust, nor are their families or anyone in which they can be perceived to be in a relationship with.

In addition, rigorous rules concerning the conduct of Trust Member and Board meetings require that each meeting begins with a formal declaration by all those present that they have no conflict of interest in any item to be considered and the meeting and its chairperson are empowered to require the absence of any member who may be so compromised. All members have been thoroughly background checked including DBS and their details are retained in the secure confidential Trust single central record.

Our Auditors regularly review all financial operations of the Trust and we have a Whistleblower policy in place to ensure the protection of any staff or volunteer disclosures

Each member and board meeting includes reports on operational statutory and ethical compliance, Child Safety(Safeguarding), Academic performance of the academy(ies), Finance and conclude with a statement of estimated risks.

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

The Board challenges [REDACTED] on these matters and has members experienced and qualified to do so. All Directors have read-only access to the Trust Accounting Systems and can interrogate and query any transaction.

The Board is carefully growing its capacity and skills base. Currently, it depends on high quality external professional advice for legal and financial matters. In the coming year it is planning to recruit new board members with greater legal and accountancy qualifications and experience. It is doing this through personal introduction and application to schemes such as the Academy Ambassadors programme.

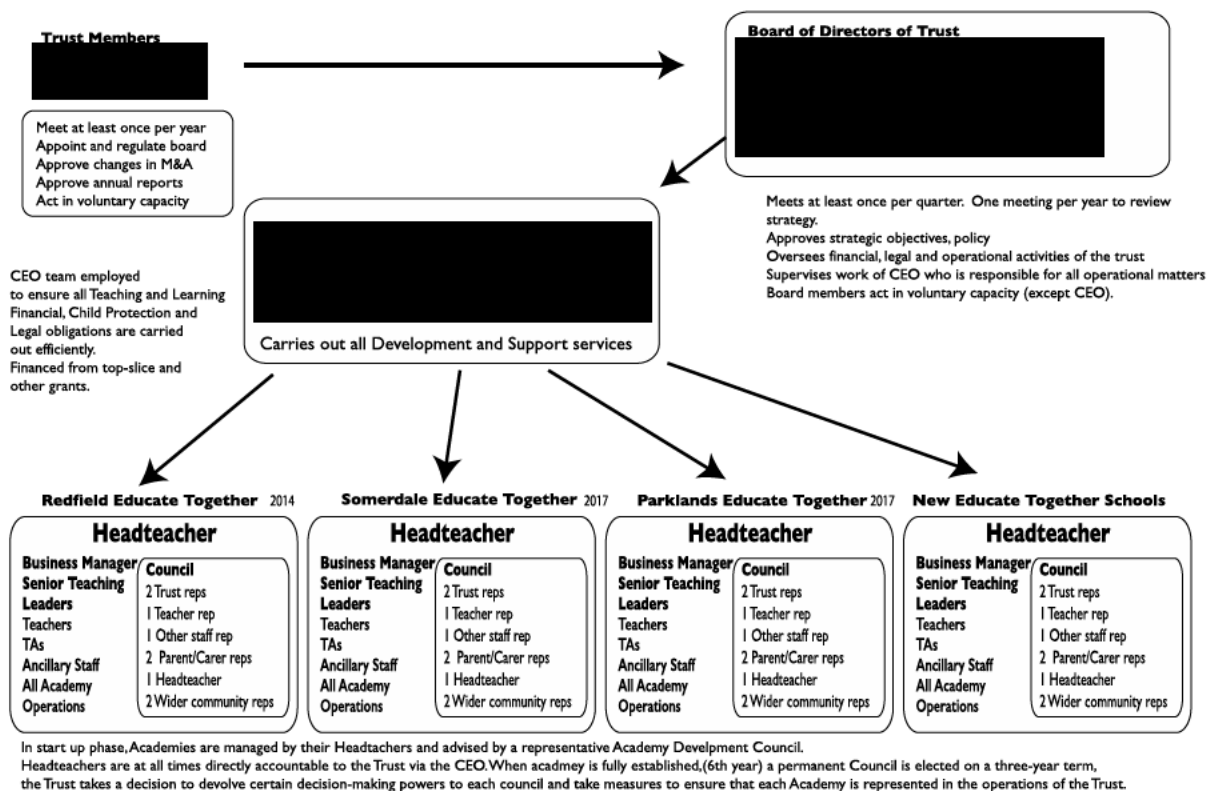
Board members attend at least one day long strategy and planning session per year. This session includes detailed training on updated statutory regulations and government regulation. In particular, it includes reference to the latest versions of the DfE Governance Handbook and EFA Financial Handbooks. All Directors are alerted by email of any update on such regulations.

The Board's Guide to Directors is attached as an appendix.

[REDACTED] report on a formal monthly reporting cycle this a procedure that is approved by our board and external auditors.

This ensures that regular performance data is scrutinised by [REDACTED] and reported to the Trust board.

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



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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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

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

[Add text here. Table expands]

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

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

- use the space provided below; and
- refer to the [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

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

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

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

- use the space provided below; and
- refer to the [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

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

Section G – budget planning and affordability

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

Please:

- complete the Excel spreadsheet (where necessary);
- add any commentary you want to include in the space provided below, for example, explaining the costs of centrally provided services (we do **not** want you to provide a commentary on the whole budget, please only include particular areas you want to highlight); and
- refer to the [how to apply to set up a free school guidance and the criteria for assessment](#) for what should be included in this section.

G1 – budget planning and affordability

Each School has a balanced budget, where there is no historical information the costs have been calculated using the typical school costs supplied within the spreadsheet. The specific leadership arrangement for each school are set out on pages 31 and 32 but will be supported centrally.

To benefit from economies of scales the Trust has a central management function that provides the following support:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

The Trust provides the following services to its academies

- HR – recruitment and advice
- Finance and Payroll
- Contract management
- Group procurement

KPIs are set on financial performance of individual academies and these are reviewed regularly (monthly) at board/school and where appropriate at student level. Financial performance is also monitor on a quarterly basis with the Trust finance

G1 – budget planning and affordability

committee.

Each School within the Trust has a delegated budget and follows a proven scheme of delegation.

The Trust will ring fence POG specially to support the diseconomies of scale within each school. This commitment is demonstrated by the KPI in the spreadsheet for staffing ratios.

Salaries follow national frameworks and the living wage. However, resilience to adapt to a challenging economic environment is factored into The Trust pay policy.

Whilst expanding, the Trust will take a four pronged approach to recruitment of staff to ensure that it can attract the best talent whilst protecting itself from long term liabilities.

- Rigorous recruitment process and due diligence
- Robust performance management
- Fixed Term Contracts
- Buy in expertise

The geographical proximity of our network of schools supports the sharing of resources. As the number of Academies increases, the Trust will be able to use economies of scale to increase its purchasing power. The Trust is seeking to collaborate with fellow providers to make even more effective use of greater purchasing power.

The Trust operates a lean support function with maximum use of ‘on the cloud’ services. We believe that this maximises the resources that can be used to support learning and teaching.

The Trust benchmarks its financial performance of its schools against other Academies and national averages to ensure that it operates above the curve and that it can quickly identify areas for improvement.

Additional funds, such as the pupil premium grant are targeted to ensure maximum impact for those entitled to benefit from them. [REDACTED] as the accounting officer of the Trust, oversees financial monitoring and acts to ensure that the scheme of

G1 – budget planning and affordability

delegation and all policies and procedures are adhered to.

The School will generate income from catering, lettings and prudent investment. Our Schools are a community hub and in doing so will generate income. Where practical, the Trust will assist community-based charity and social enterprise start-ups by adopting a partnership approach to costs. This will give new initiatives the chance to grow and at the same time allow the Academy to model its environmental and social principles, allow appropriate student engagement and make a contribution to the community.

The Trust transfers any significant cash balances to a higher interest saving account to maximise investment income. Academies are regularly audited, with two internal audits per year and an annual external audit. These reports are monitored by the Trust board financial sub-committee.

The Trust has risk registers, based on a matrix indicating the likelihood of risk and impact should an event occur. Mitigation measures are in place to reduce risks to an acceptable level. The Trust maintains considered levels of reserve to support itself and individual academies in the light of any changes to the economic and demographic factors that could impact on them.

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 [how to apply to set up a free school guidance and the criteria for assessment](#) 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, i.e. as one Word document.
- Refer to the relevant section of [*how to apply to set up a free school guidance and the criteria for assessment*](#) for what should be included in this section.

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

CV template		
	point score per entry and per student for level 3 qualifications.	
5b	For education only: if you are in a teaching or head of department role in your latest school (where available):	N/A
6	Brief comments on why your previous experience is relevant to the new school	[REDACTED]
7	Optional: brief comments on how the role you played helped to raise standards in any or all of your three previous roles.	[REDACTED]
8	Reference names(s) and contact details	[REDACTED]
CV template		
1	Name	[REDACTED]
2	Area of expertise (i.e. education or finance)	[REDACTED]
3	Details of your last three roles including: <ul style="list-style-type: none"> • name of school/ organisation • position and responsibilities held • length of time in position This should cover the last four years. If not, please include additional roles	Name: [REDACTED] [REDACTED] Position: [REDACTED] Dates: [REDACTED]
		Name: [REDACTED] [REDACTED] [REDACTED] Position: [REDACTED] [REDACTED] Dates: [REDACTED]

CV template		
		Name: [Redacted] Position: [Redacted] Dates: [Redacted]
4	For finance only: details of professional qualifications, including:	N/A
5a	For education only: if you are in a leadership position in your latest school (where available): <ul style="list-style-type: none">the school’s results for the years you were in post – these should include, as appropriate, Key Stage 2 results, 5A*-C GCSE including English and maths results or, for 16 to 19, average point score per entry and per student for level 3 qualifications.	[Redacted]
5b	For education only: if you are in a teaching or head of department role in your latest school (where available): <ul style="list-style-type: none">Your subject/department’s results for the years you were in post, compared to your school’s averages – these should include, as appropriate, Key Stage 2 results, 5A*-C GCSE including English and maths results or, for 16 to 19, average point score per entry and per student for level 3 qualifications	[Redacted]

CV template		
6	Brief comments on why your previous experience is relevant to the new school	[Redacted]
7	Optional: brief comments on how the role you played helped to raise standards in any or all of your three previous roles.	[Redacted]
8	Reference names(s) and contact details	[Redacted]

CV template

8	Reference names(s) and contact details	[Redacted]
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Annex A: Swindon Borough Council, Letter of support



Dear Sir Madam

Confirmation of support for the Educate Together free school application

Swindon Borough Council fully supports the Educate Together application to establish two free schools in Swindon.

We understand that Educate Together intend to submit an application to establish a two form entry primary school with nursery at the [redacted] and to establish a one form entry school with nursery on the [redacted]

We confirm that there is a need for these types of school in the local area and Educate Together will be meeting a need set out in the Swindon School Place Planning Study.

Swindon Borough Council's Cabinet will also consider a report to support the application for a new free school at its meeting in October 2016. The Council is working in partnership with Educate Together to move this project forward and look forward to the opening of the new free school.

Yours faithfully



The Vision for Education in Swindon

For every child, irrespective of background, to fulfil their potential through the best education possible

Annex B: Scheme of delegation

Educate Together Academy Trust

Members

The members of the trust meet at least once per year. They have ultimate authority for all trust business.

Authority to:

- Approve changes in the Memorandum and Articles of Association of the Trust. subject to statutory requirements.
- Approve Annual Report,
- Approve Audited Accounts
- Appoint or Remove Directors
- Approve the appointment of the chairperson of the Board of Directors
- Approve mergers or acquisitions with or of other trusts or companies
- Approve long-term contracts or leases or significant borrowings or loans to and from third parties to a value in excess of 20% of the Trust's annual revenue.
- Approve fundamental policy positions of the Trust
- Approve any changes to this scheme of delegation
- Approve or remove members of the Trust
- Can seek the liquidation or wind up of the Trust

Directors

The board of directors of the trust meet at least three times per year. The board operates with collective obligations.

The board of directors has collective authority and responsibility to:

- Ensure the Trust complies will all statutory and regulatory obligations
- Approve the Trust's strategic business plan
- Approve the Trust's operational plan
- Approve annual and three-year budget plans for the Trust
- Approve the Trust's Annual Report
- Approve the Trust's Audited Accounts
- Report as required by statute or regulation to relevant State authorities.
- Recommend appointment or removal of directors or members
- Appoint or dismiss board sub-committees and set, review or alter their formal terms of reference
- Appoint a Company Secretary

- Approve the contract of [REDACTED]
- Hold [REDACTED] to account for her/his performance against agreed targets
- Appoint a [REDACTED]
- Approve the opening or closing of any Educate Together academy
- Approve any proposal for existing academy or school to join the Trust
- Approve Funding Agreements for academies with Secretary of State and the Education Funding Agency
- Review termly reports on the operations of all academies operated by the Trust
- Review termly reports onto operations of the Trust
- Approve any contract or expenditure in excess of [REDACTED]
- Approve the appointment of all Headteachers for any academies established by or who have joined the Trust.
- On the recommendation of [REDACTED] delegate certain functions and power of decision to an Academy Council of an academy set up by or converted to Trust sponsorship.

[REDACTED] of the Trust

[REDACTED] is responsible for all day-to-day operations of the Trust. He/she is responsible for drawing up the strategic business plan for the Trust and budgets and the operational plans to implement this. These plans must be approved by the full board of directors.

[REDACTED] has full responsibility to recruit the Trust's staff, set contracts and manage their performance according to the Trust's business plan and agreed budgets.

On the Trust's behalf and with the [REDACTED] [REDACTED] is responsible for all the Trust's statutory compliance and reporting and has specific authority to sign documents in this regard.

The CEO has authority to:

- Appoint and dismiss Trust staff on salaries consistent with agreed budgets
- Obtain legal and other advice on behalf of the Trust
- Initiate legal proceedings where necessary
- Sign contracts and pay bills up to a value of £20,000 consistent with agreed budgets
- Approve the budgets and operational plans of academies set up by the Trust
- Ensure that all academies, free schools or other organisations set up by the Trust fully comply with all legal obligations
- Review monthly reports from Headteachers or Principals and work with them to ensure the highest possible performance of the academies they lead.
- Recommend the appointment of Headteachers for all academies operated by the trust.

Operational method

- Hold senior staff to account for performance of Trust

Annex C Director's Guide

Directors Guide

Educate Together Academy Trust



Welcome to Educate Together

Thank you for accepting a position as Director of the Educate Together Academy Trust. We hope you have a really rewarding volunteering experience with us and that together we can make a real contribution to the education of children in the UK.

This guide has been prepared to give you all the basic information that you need to carry out your role as a Director of the Educate Together Academy Trust. It outlines some of the basic requirements of your role. However, this is not intended to be an exhaustive legal manual. Your role as a director of a charitable company in the UK is also defined by company law and regulations that are regularly updated by the Department for Education (DfE).

Please also be aware that this is the first edition of this guide and, as a learning organisation that thrives on the creative input of its volunteers, Educate Together will be very glad to hear your suggestions as to how this guide could be improved.

The Trust

The Educate Together Academy Trust (the Trust) is a company limited by guarantee with no share capital. It was set up by Educate Together, the established Irish educational charity.

The Trust is registered with the Department for Education and is strictly regulated to ensure that it operates as a genuine educational charity. Legally it is a "Multi-Academy Trust" (MAT).

Members of the Trust meet at least once a year to review the work of the Trust, admit or remove members and appoint or remove members of the Board of Directors. The Board of Directors is responsible for the strategy and policy of the organisation and the regular oversight of operations of the Trust. Responsibility for all operational activities is delegated to the [REDACTED]. The board meets at least four times per calendar year.

Unique nature

The Educate Together Academy Trust is unique in the UK in that it has been set up by a long-established Irish educational organisation, Educate Together. Educate Together has over 30 years experience of managing and developing a network of high performing, equality-based schools. It is a company of over 90 members and in 2016 it managed a network of 81 primary and 9 secondary schools. As a result, there is a special opportunity to build the governance of the Trust in a 'learning way' to take advantage of this experience in the UK context. The members of the Trust are taking a careful and considered approach to building the governance and accountability structures of its first cluster of schools in Bristol and the South West of England.

This means that the members wish to consider very carefully the way the membership of the Trust is built and in particular how this membership reflects the school communities that they are working to establish. It also means that the Trust is open to creative suggestion to evolve and improve the governance structures that it is putting in place.

Prime directive

The Educate Together principles were adopted at the first meeting of the members of the Trust in 2014. These four principles form the prime directive that drives all its activities.

"The Educate Together Academy Trust will open and operate schools that are:

Equality based i.e. all children having equal rights of access to the school, and children of all social, cultural and religious backgrounds being equally respected,

Co-educational and committed to encouraging all children to explore their full range of abilities and opportunities,

Learner-centred in their approach to education,

employees, parents, pupils and 'critical friends'. It is anticipated that these statements will be finalised in the current year (2016/7)

The Trust's initial strategy is to establish a cluster of five or six Educate Together schools in Bristol and the South West of England. Its current draft vision and mission statements are:

Vision

To provide an excellent education that promotes equality, harmony and respect for difference and an understanding of the needs of a sustainable global society.

Mission

Open, run and develop successful Educate Together model schools offering a quality educational alternative.

Offer this model of equality-based education to other educational professionals, schools and parents.

Lead debate on the importance of ethical education pedagogy and curriculum especially in the current context of anxiety over ethnic and religious tensions and the breakdown of social cohesion

Articulate and lead in the debate on Education for Sustainable Development in the UK education system

Support and commission research into the efficacy and delivery of ethical education

Build a centre for CPD and resources in the UK application of the Learn Together ethical education curriculum.

Redfield Educate Together Primary Academy is the first Educate Together school in England and the Trust is actively applying to run other new academies. It has also been asked to assist in the sponsorship of schools in "special measures" in the region.

In 2017, the Trust will open new primary schools in Locking Parklands, North Somerset and Somerdale, Keynsham, B&NES.

The Trust will closely monitor the work of these schools to ensure that the first Educate Together academies implement the Educate Together ethos and ethical education curriculum to the full and operate as excellent educational facilities according to the national standards that apply at the time.

The Trust currently operates from an office in the Redfield Educate Together building and enjoys extensive support from the Educate Together office based in Dublin.

Composition of the board

Directors are appointed by the members of the Trust. It is not currently expected that the board should have more than ten members. Directors are chosen for the range of skills that they can bring to the deliberations of the board. The board will normally allocate specific areas of responsibility to each director or set up sub-committees for this purpose. The current areas of responsibility are:

- Finance

- Governance
- Teaching and Learning
- Child Protection (Safeguarding)
- Health and Safety
- Buildings

The [REDACTED] the Board of Directors

[REDACTED] is appointed by the members of the Trust from time to time. [REDACTED] is responsible for managing all meetings of the board, has a casting vote and can sign documents on behalf of the board. Subject to legal constraints and reasonable prudence, [REDACTED] can take timely decisions on behalf of the board between meetings. [REDACTED] is the main conduit for representations to the board.

The day to day work of the Trust is organised by [REDACTED] who reports to the Board of Directors on a regular basis and is responsible for carrying out the board's policy decisions.

Separation of roles

Directors should be aware that their role is one of strategic policy and oversight. From time to time, especially at times of operational controversy, they may be pressed to get involved in the detail of school matters, complaints etc. It is essential that they refer all operational matters to [REDACTED] or the Head of the school. This does not however, preclude a director carrying out a voluntary role in a school. If you do so, please be aware that you are doing so 'with another hat'.

Nobody employed by the Trust, other than [REDACTED] may be a member of the board of directors.

Confidentiality of documents

During your time as a director, you will be sent many confidential documents. These may include minutes of meetings, reports on complicated and difficult school issues, HR problems, child protection issues, quality and performance issues and financial documents. You are expected to ensure that these are kept private and not disclosed to third parties.

You may not publicly speak, publish or write about these matters without the permission of the Chairperson.

Conflicts of interests

From time to time, it is normal that the board may discuss an issue in which you have a personal interest. This may be an issue that affects someone you know well or affects a business or organisation that you are involved in.

There is no problem at all with this as long as you notify [REDACTED] of this potential of a conflict of interest. In some cases, especially if there is an issue of a contract or financial relationship, the Chairperson may ask you to absent yourself from consideration of that issue.

Public Statements and Clarity of Roles

It is normal that Directors may have other public roles that

Current thinking on governance of Educate Together primary academies

Educate Together Academy Trust has considered how to grow participatory and inclusive accountability in the schools(academies) that it is setting up in England.

It is conscious that current legislation allows considerable flexibility to sponsors in these matters and is anxious that it crafts these arrangements for the best outcomes for the pupils in its schools. The structure designed below takes from good practice learnt in Educate Together's Irish operations as well as guidance from educationalists in the UK.

The Trust has established its corporate structure, Memorandum and Articles, members and board of directors according to DfE guidance and good practice for not for profits/charities in the UK.

When the Trust agrees to establish a new school and the Development team sets about the recruitment of a Headteacher designate. The team also recruits a "Shadow Council" to advise and assist in decision-making in the pre-opening phase of the new school.

When the school is opened the Development team works with the Headteacher to establish an "Academy Development Council (ADC)" which will operate until the school is full. The staff and parent representatives on this council are renewed each year to ensure that all parent and staff are represented and that a founding group of staff and parents are not over represented in the process.

The Trust has formally decided that it "will not unreasonably refuse a proposal from the ADC."

When the school is full, the ADC will become a more permanent structure called the Academy Council with a

three year term for members.

At this stage, the Trust intends to devolve some of its responsibilities and decision making to the Academy Council.

The structure of the ADC is as follows:

- Head teacher (ex officio)
- Teachers' rep (elected)
- Non-teacher staff rep (elected)
- Male carer rep (elected)
- Female carer rep (elected)
- Trust nominee (appointed by the Trust)
- Trust nominee (appointed by the Trust)

This group consists of the core board. It meets and appoints two further members who are:

- Wider community rep
- Wider community rep

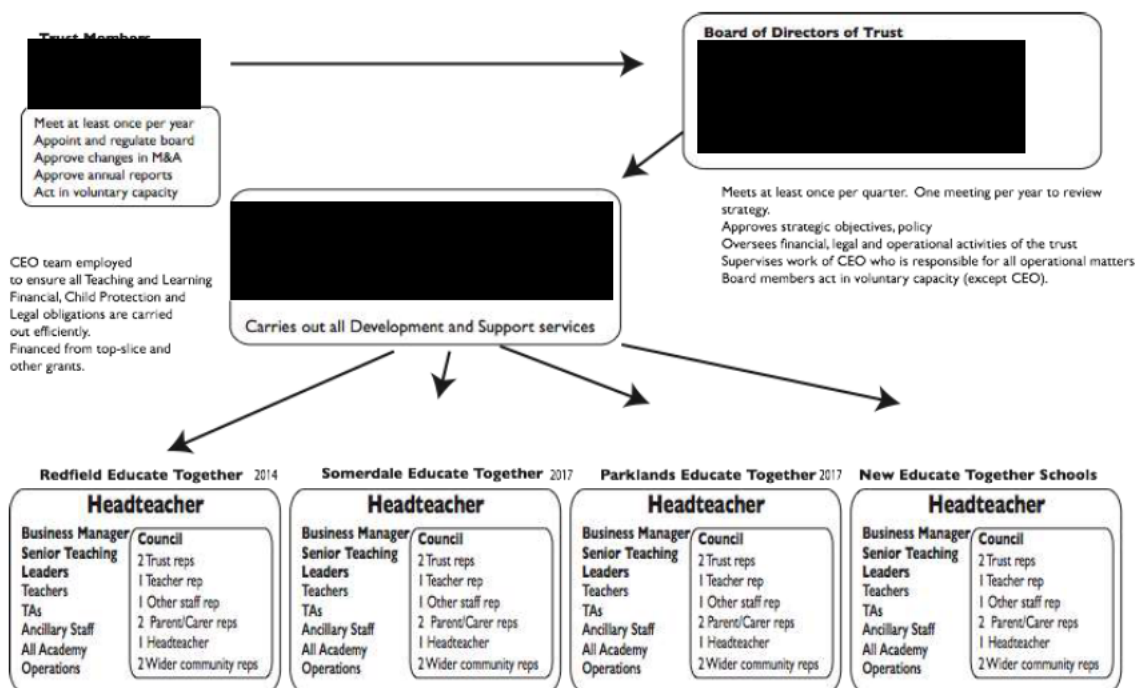
The ADC meets at least once per school term and considers a regular Headteacher's report and reports covering all aspects of the school's activities and performance.

Current thinking on representation of academies in the decision-making of the Trust

The Trust is considering how to ensure that a number of academies should be represented in its decision making.

In the next three years, it is anticipated that the Trust would be operating up to six academies in the region.

At present, the members of the Trust are examining ways in which each Academy Council could become formal sub-committees of the board of directors with specific authority assigned by the board on a case by case basis.



In start up phase, Academies are managed by their Headteachers and advised by a representative Academy Development Council. Headteachers are at all times directly accountable to the Trust via the CEO. When academy is fully established, (6th year) a permanent Council is elected on a three-year term, the Trust takes a decision to devolve certain decision-making powers to each council and take measures to ensure that each Academy is represented in the operations of the Trust.

Finance Policy

Section 1: Budgets

1.1 Budget construction

The Headteacher is responsible for the detailed preparation of the annual budget. In doing this they should consult with other members of staff to ascertain detailed requirements. [REDACTED].

The Academy Trust Finance Committee [REDACTED] [REDACTED] will determine the overall sum within which the budget must be set, and the amount of any anticipated balance to be carried forward into the following financial year.

In constructing the budget, the Headteacher must take account of priorities identified in the School Development Plan and incorporate the costs of these in the budget. Priorities identified in the Development Plan must always be costed.

The budget total must not exceed the amount of the EFA allocation plus or minus any balance brought forward from the previous year. If it appears that this cannot be achieved, the Headteacher must inform the Trust immediately this becomes apparent. At this point, a Finance Committee meeting (and, if necessary, a full Trust meeting) will be held to discuss this issue and work out a way forward to mitigate any financial risk to the school and Trust.

The Finance Committee must meet in the Autumn term to consider a broad budget strategy, and again in the Spring term to consider and approve the detailed budget. The full Academy Trust must subsequently approve the full budget, and minute this approval.

In constructing the detailed budget, factors the Headteacher must take account of include:-

- any anticipated changes in pupil numbers
- current and previous year's expenditure levels on individual Academy budgets
- Development Plan priorities
- staff pay awards and increments
- anticipated price inflation
- changes in the staffing complement
- changes in the supply of services (gas, electricity, oil, water etc.)
- carried forward surplus
- planned surplus for the following year(s).

1.2 Budgetary control and monitoring

The Headteacher is responsible for regular, detailed control of the academy budget. To achieve this they will receive monthly reports from the academy's accounting system. Such reports shall show, for each Academy budget:-

- total budget for year
- total commitment and expenditure to date
- variance

The Headteacher is empowered to take remedial action to address variances, by effecting transfers between individual Academy budgets. Individual transfers may be authorised as follows:-

- [REDACTED] Headteacher (and subsequently report to full Trust)
- [REDACTED] Headteacher and [REDACTED]
- [REDACTED] Finance Committee
- [REDACTED] Full Trust
- Transfers between budgets, once approved, must be promptly recorded in the academy's accounting system to keep the approved budget up to date.

The Headteacher will present detailed budget monitoring statements to the Finance Committee on a termly basis, such statements shall show for each budget heading:-

- total budget for year
- total commitment and expenditure to date
- variances

The Finance Committee shall consider such statements, the Headteacher will provide explanations for any significant variances identified. [REDACTED] shall report termly to the full Trust, identifying any significant budgetary issues and any remedial action taken or needed, and any policy decisions needed.

The Headteacher may assign budgetary control of individual budget headings to other members of staff. Such members of staff must receive monthly budget statements as detailed above. The Headteacher remains ultimately accountable to the Trust for these budget headings.

Payroll expenditure data must be entered promptly each month by the academy finance officer/business manager on to the academy's accounting system.

Other, non-pay, expenditure must be reconciled promptly on a monthly basis to the academy's accounting system by the academy [REDACTED].

When the accounts for each financial year are closed, a final statement from the academy's accounting system must be presented to the next meeting of the Trust Board of Directors.

Section 2: Payroll

2.1 Starters/variations/leavers

All forms for:-

- setting up new employees on the payroll (starters)
- effecting variations to pay
- taking existing employees off the payroll (leavers)

Must be made out by the academy finance officer/business manager and authorised (signed) by the Headteacher.

2.2 Time sheets

All time sheets submitted by a member of staff must be checked initially by the school finance officer/business manager, and then authorised (signed) by the Headteacher.

2.3 Checking of payroll data

Payroll data received monthly must be scrutinised by:

- the Headteacher, to ensure all employees are recognised, and pay appears reasonable (no detailed check)
- the school [REDACTED] to check accuracy of pay calculations.

2.4 Pay-related expenses

All pay-related expenses must be processed through the payroll system. Pay-related expenses must never be paid via petty cash, or by the creditor payment system.

2.5 Supply teachers

The Trust will decide, on the basis of advice from the Headteacher, whether supply teacher insurance cover shall be taken out, and the extent of the cover. All claims submitted by supply teachers must be authorised (signed) by the Headteacher.

Reimbursement claims must be submitted on a monthly basis by the [REDACTED]. [REDACTED] must check on a monthly basis that correct amounts have been charged as per the expenditure printout.

Section 3: Academy Fund

3.1 Accounts

The accounts of the academy are to be maintained on a day to day basis by [REDACTED]. [REDACTED] All income and expenditure will be entered promptly in the accounts. A bank reconciliation will be performed monthly when bank statements are

received, between the balance as per the accounting record and the balance as per bank statements.

3.2 Signatories

The following are allowed to sign cheques or authorise electronic payments on the academy bank accounts:-

██████████
██
██
██████ ██████
██

There must be two signatures or authorisation on each cheque or electronic transfer.

3.3 Final accounts and audit

Final accounts are prepared at the end of the academy financial year by the ██████████
██ accounts will be audited by an auditor appointed by the Trust. The auditor will not be a member of the Trust. The Trust has appointed ██████████
██ as auditors.

The audited accounts should be presented to the Trust for approval. Trust members approval must be recorded in the minutes of the meeting.

Academy Fund monies must be kept, and recorded, separately from the academy's capitation monies and securely held.

Section 4: Assets

4.1 Inventory

The portable, desirable, attractive assets of the school, as well as any assets of intrinsic value (e.g. artwork or valuable historical objects) will be recorded in the school's inventory. Full details (make, model, serial number, approximate value) shall be recorded.

The school finance officer is responsible for keeping the inventory up to date by adding new items when they are received into school.

Items up to a value of ██████████ may be sold or written out of the inventory on the authority of the Headteacher. Over this limit, the Finance Committee must authorise and details recorded in the minutes. Reasons must be recorded in the inventory, together with the Headteacher's signature (up to ██████████) or the Finance Committee's minute reference ██████████. An official receipt for sales income must be issued to the purchaser.

Inventories shall cover all areas of the school, and be arranged on a room-by-room basis. A separate inventory will be maintained to include items which are not allocated to a specific room.

The inventory shall be checked against the actual assets by the Headteacher on an annual basis. Any discrepancies shall be investigated immediately, and if necessary the Governors, Police and the authority's auditors shall be informed. The check shall be evidenced by the checker signing and dating the inventory.

All inventory items should be security marked:

- invisibly with an ultra-violet pen, and
- visibly with warning stickers.

4.2 Off-site register

Any inventory items taken off-site by members of staff for official purposes must be recorded in a register. The date borrowed, and the signature of the borrower, must be recorded. On the return of the item the date of return will be recorded.

Section 5: Income

5.1 Credit income

Where payment for goods/services provided by the school is made after the provision takes place.

An official invoice must be raised by the school finance officer in all cases and sent to the debtor as soon as possible after the provision of the goods/service, and no later than one week after the provision.

A file of copy invoices will be maintained by the finance officer; this will be arranged into 'paid' and 'unpaid' invoices. The copies of unpaid invoices will act as a control record for the sending of reminders and the chasing of unpaid debts.

Reminders will be sent after the following periods if the debt remains outstanding:-

- 1st reminder 28 days
- 2nd reminder 56 days

If after 84 days the debt remains unpaid, consideration will be given by the Headteacher and/or ██████████ to writing the debt off in accordance with the following limits:-

- ██████████ Headteacher may authorise write-off,
- ██████████ Finance Committee may authorise write-off,
- ██████████ Board of Directors of Trust may authorise write-off.

In each case, the possibility of taking legal action to recover the debt must be considered by Headteacher, and Finance Committee as appropriate.

As well as sending formal reminders, efforts must be made by the school to contact the debtor in order to secure recovery of the debt. If payment has not been received after 28 days of raising the invoice, no further goods or services must be provided until the outstanding debt is settled.

When an invoice is paid, details of the payment must be written on the copy invoice, and this transferred to the 'paid' section of the file. An official receipt should be issued to the debtor and the receipt number written on the copy invoice; a duplicate copy of the receipt must be retained at school.

5.2 Cash income (i.e. where payment is received at the time goods/services are provided).

An official receipt must be issued to the payer at the time the payment takes place, and a duplicate copy retained at the school.

5.3 Banking

All income received (cash or cheque) must be banked promptly and intact. No payments may be made out of income collected. A record to evidence the banking must be kept (e.g. stamped paying-in slip).

5.4 Charging policy

The school will set a charging policy to cover items such as:-

- lettings
- school trips
- music tuition
- private photocopying
- private telephone calls

The charging policy will be reviewed annually by the [REDACTED] [REDACTED]r. Charges levied by the school will be in line with this policy.

5.5 Donations

Donations from any sources must be acknowledged by the issue of an official receipt to the payer. All donations must be banked promptly and intact and must be clearly identified in the accounts of the Academy.

5.6 Official Capitation and School Fund income

All income used to offset expenditure incurred on the capitation budget (e.g. lettings, photocopying, telephone calls, music tuition, sales of work) must be paid into the Academy Fund and coded to an appropriate income code.

Donations may be paid into the Academy accounts for purposes determined by the wishes of the donor which must be ascertained beforehand and clearly identified in the accounts of the Academy.

5.7 Cash received from pupils

Cash received from pupils in class must be handed to the [REDACTED]. Cash collected must be handed over to the [REDACTED] frequently. The [REDACTED] will issue an official receipt for any amount in excess of [REDACTED].

5.8 Security of receipt books and tickets

All unused receipts and tickets to be used to acknowledge receipt of income, must be held securely in the Academy office.

Section 6: Purchasing

6.1 Ordering

Academy procedures for purchasing should ensure that purchases are as required and are for bone-fide purposes.

Orders should be processed by the academy finance officer after initial approval by the Headteacher has been sought and given. The official order produced from the computer system must be signed by the Headteacher before it is sent to the supplier. If an order has been placed over the telephone an official confirmatory order must be sent.

Official orders must not be used to procure goods for private purposes.

Official order stationery must be held in a secure location.

Copies of all official orders placed must be retained on file at the academy by the finance officer.

When placing orders it is the responsibility of the initiator to ensure that Academy Trust Regulations and Standing Orders are adhered to, these being -

6.2 Quotations/tenders

Financial Regulations - for orders for goods/services under [REDACTED]:

- [REDACTED] - at least three prices to be examined and retained, these prices may be taken from suppliers' written quotations or catalogues/price lists.

- [REDACTED] - independent written evidence of at least three prices should be obtained and retained.

Independent written evidence means quotations provided on suppliers' headed notepaper.

Standing Orders - for orders for goods/services over [REDACTED]

Tenders should be invited in one of three ways, and in accordance with specific Standing Orders.

- from at least three contractors
- from at least three appropriate contractors
- by open competition by advertisement in local newspaper or appropriate journal.

6.3 Board member involvement

As well as ensuring that the above have been adhered to, it is the responsibility of the Headteacher to ensure that finance committee members are consulted in the following circumstances:-

- On purchasing decisions when the estimated cost of one item exceeds [REDACTED]
- Review of quotations obtained where estimated costs exceed [REDACTED]
- Review of quotations when the lowest quote is not the most suitable or the pre-requisite number of quotes could not be obtained.

In such circumstances the Members should formally authorise a waiver of the regulations, either prior to the purchase or retrospectively, if necessary, and document why the waiver of the regulations has been agreed.

6.4 Receipt of goods

Once items ordered have been received, the finance officer must ensure that items delivered correspond to details contained in the delivery note. Upon examination of goods the finance officer must ensure that both quality and quantity are appropriate.

6.5 Invoice check and authorisation

Invoices received must be checked to both copy orders and delivery notes to ensure that invoices relate to goods ordered and delivered. Invoices should also be checked for arithmetical correctness. All invoices must be certified for payment by the Headteacher before being passed for payment.

Invoices passed for payment must be recorded promptly in the academy's accounting system by the finance officer.

6.6 Petty Cash

Day to day operation of the petty cash account is the responsibility of the finance officer.

All petty cash expenditure, and reimbursement income, must be promptly recorded in the petty cash record.

Reimbursement must be claimed monthly or when one-half of the agreed 'float' advance has been used. The Headteacher must certify the reimbursement claim.

Each time a reimbursement claim is submitted, the finance officer must complete a reconciliation ensuring that cash expended, plus cash in hand or at bank, plus stamps held, equals the amount of the advance.

All members of staff who wish to purchase items from the petty cash account must obtain prior approval from the Headteacher. Vouchers (receipts, paid invoices etc.) to evidence the payment must be presented to the finance officer by members of staff when reclaiming cash from the account. These vouchers must be retained by the finance officer and returned with the reimbursement claim.

In normal circumstances individual purchases from petty cash must not exceed █████. In exceptional circumstances payments up to █████ may be made, with the express prior approval of the Headteacher. Such payments should be for emergencies only and should not simply result from a lack of planning.

All cash and cheque books held must be retained securely.

Section 7: Register of Pecuniary and Other Interests

The academy shall maintain such a Register.

7.1 Persons to be included:-

All members of the Academy Council and Academy Trust and its Board of Directors and staff.

- Headteacher of the academy
- All senior staff of the academy

7.2 Interests to be recorded

The basic principle to be followed is that any interest should be recorded which could be seen to improperly influence any decisions taken, pecuniary or otherwise, regarding the operation of the academy.

Examples of such improper influence might be:-

- to purchase goods or materials from a company in which a person on the register has a financial interest without going through the correct procedures re. obtaining competitive prices;

- promoting member of staff who has close personal relationship (spouse, partner, son, daughter etc.) with board member/senior member of staff, without going through correct procedures re. recruitment and selection.

There can never be a definitive, comprehensive list of the interests which should be recorded, but the following is intended to give some guidance:

- having a financial, or other, interest in an organisation which could feasibly be in a position to supply goods/services to the school e.g.
 - building contractors
 - plumbing contractors
 - electrical contractors
 - audio/visual goods suppliers (e.g. T.V.s, video recorders, hi-fi etc.)
 - repair/maintenance of equipment (electrical and other)
 - suppliers of computer hardware and software
 - suppliers of stationery
 - suppliers of educational equipment (e.g. P.E. equipment)
 - suppliers of furniture, fittings, carpets, curtains etc.
 - decorating contractors
 - catering contractors
 - suppliers of provisions
 - suppliers of clothing
 - suppliers of building materials
 - suppliers of catering equipment
 - suppliers of fuel
 - suppliers of vehicles
 - suppliers of books
 - grounds maintenance contractors
 - gardening contractors
 - suppliers of grounds/garden maintenance equipment
 - suppliers of plants, trees, seeds etc.
 - suppliers of heating equipment
 - suppliers of lighting equipment
 - suppliers of musical instruments
 - suppliers of insurance
 - consultants (e.g. legal, financial, training, property)
 - suppliers of security services and supplies

- suppliers of art materials
- suppliers of telecommunications equipment
- suppliers of photographic equipment
- transport contractors (e.g. coaches, taxis etc.)
- holiday/travel operators
- suppliers of supply teaching cover
- suppliers of peripatetic teaching
- suppliers of banking services
- suppliers of workshops etc. (e.g. drama, music)

the interest in the above 'supplying organisations' may, for example, be:-

- as a director
- as an employee
- as a major shareholder
- as a major investor
- as a major debtor/creditor
- having a close personal relationship (spouse, partner, son, daughter, parent etc.) with a person in the above categories
- being in a position to potentially influence decisions made about the school, e.g. as:-
 - member of local council (County Council, District Council, Parish Council)
 - officer of Local Education Authority in a senior capacity
 - Member of Parliament
 - OFSTED Inspector
 - officer of local council (District Council, Parish Council) in a senior capacity
 - having a close personal relationship (as described above) with any person falling into the above categories
 - having a close personal relationship with a Governor or member of staff (employed on a full-time, part-time, permanent, or temporary basis).

Finance Committee Policy review schedules and associated activities required during the academic year:

- | | |
|--------------------|---|
| • October | Review Finance committee terms of reference |
| • October | Review Finance Policy |
| • November schools | Undertake finance benchmarking comparisons to other schools |
| • January | Consider and Agree a broad budget strategy |

- March Review best value Statement
- March/April Consider and approve school Budget prior to submission.
- June Review charging policy

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Self-assessment form for independent schools

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

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

<p>Quality of teaching in your school</p>	<p>[In this area, one might expect to see a clear understanding of teaching quality across the school and accountabilities to ensure the dissemination of outstanding practice and delivery of performance management. Staffing structure and accountabilities in relation to the curriculum and any new curriculum changes that might be developed due to the changing nature of the intake. Consistency of student presentation of work and scrutiny reference progress and standards How marking, assessment and students feedback/reflection enhances pupil learning Teaching strategies including setting of appropriate homework, together with a review of support and intervention strategies to match pupil needs How teaching promotes pupils learning and progression The review should be validated externally to ensure moderated outcomes for the school Reading, writing, communication and mathematics across the curriculum. Tutor and pastoral time including SMSC and British values please delete this guidance before submitting this form]</p>		
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<p>Behaviour and safety of pupils</p>	<p>[Please refer to the Ofsted handbook and supplementary handbooks eg Keeping Children Safe in education for further guidance.</p> <p>Some areas for inclusion might include; SCR, Safeguarding policy, training including Prevent and procedures. This area should be validated through a formal external safeguarding review and case studies. Health and safety procedures, policy, training and again supported by clear validated evidence.</p> <p>Data on key areas such as attendance (grouped data), persistence absence, exclusions compared to national data sets</p> <p>Student questionnaires and reviews as evidence to support outcome conclusions. Parental questionnaires and where appropriate business partners.</p> <p>Pupils attitudes to learning and the creation of a positive ethos</p> <p>Mock Ofsted information on behaviour and behaviour management strategies, policies and procedures</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 		



Department
for Education

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