



Department
for Education

Free school application form

Special schools

Published: July 2016

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

LINDEN HILL

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The application form explained

Before completing your application, please ensure that you have read both the [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 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.

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).

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 type="checkbox"/>	<input checked="" type="checkbox"/>
2. Have you provided information on all of the following areas (where appropriate)?		
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 type="checkbox"/>	<input checked="" type="checkbox"/>
Section H: Premises	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Is the information in A4 format, using Arial 12 point font, and includes page numbers?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Have you fully completed the appropriate budget plan(s) where necessary?	<input type="checkbox"/>	<input checked="" 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. 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 (e.g. safeguarding, welfare and bullying) – this includes statutory requirements (those that are enshrined in legislation) and non-statutory requirements (those contained in DfE guidance); and
- for children with an education health and care plan ('EHCP') naming the school, the requirements pertaining to children with SEN within the special educational needs and disability (SEND) code of practice, including the duty to admit a child where the school is named in an EHCP;
- for schools where the Secretary of State agrees in the funding agreement that they can also admit non-statemented pupils with special needs, the school must, in respect of these pupils, comply with the School Admissions Code, the School Admissions Appeals Code and the admissions law as it applies to maintained schools. 16-19 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: Chair of company / Member of company (please delete as appropriate)

Print name:

Date:

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

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

Why we want to set up Linden Hill

We wish to set up a new free school for pupils with autism in the East of Surrey to address the shortfall in places currently available. As an established Teaching School Alliance we are excited by the opportunity to develop this free school, to shape the education landscape for future generations of pupils with autism. We are resolute that this provision should deliver the best outcomes for all stakeholders, being located strategically in an accessible and high-demand area of Surrey and therefore close to home for pupils and their families. Surrey County Council has identified the need for this specialist autism school (referred to in Surrey as Complex Social and Communication Needs (CSCN)). Parental engagement has highlighted the importance of more special school places in the local community.

Linden Hill School will meet the needs of children who have autism as their primary need. They will typically have autism, learning difficulties and associated needs. They will require a highly specialised environment and teaching approaches in order to overcome barriers to learning and ensure the best possible outcomes. All pupils will have an Education Health and Care Plan (EHCP). Linden Hill will have places for 120 pupils aged from 4 to 19, across three distinct phases: Primary, Secondary and Further Education. Sixth form provision will enable our most complex learners to have an extended education to maximise their outcomes in independent living, employability, community participation and healthy lifestyle. Typically, pupils will be taught in small classes of 6 to 9. In addition, flexible teaching spaces for the most complex and high need learners will be planned to enable us to develop highly individual provision for those pupils who are unable to cope with full time education in a classroom shared with others.

Linden Hill will be based in Leatherhead, and will primarily serve the East Surrey catchment area. Our target opening date will be September 2018. Linden Hill will be modelled on Linden Bridge School, which opened in the 1970s and is a highly successful special school which has been consistently rated 'Outstanding' by Ofsted. Over time Linden Bridge School has grown from a school for 40 primary pupils to an all age 4 to 19 school for 123 planned places with a residential learning provision. Surrey County Council is only commissioning residential places from Linden Bridge, therefore Linden Hill will not have a residential provision.

Linden Bridge and West Hill Schools are leading on the free school application. They are both 'Outstanding' Special Schools who have formed the SEND Teaching School

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

Alliance, which strives for excellence for all learners with SEND (Special Educational Needs & Disabilities), wherever they are placed. Both Headteachers are National Leaders of Education (NLEs).

Multi Academy Trust Vision

Linden Bridge and West Hill Schools will establish a Multi Academy Trust (MAT). Linden Hill will form part of this MAT. Other special schools in East Surrey are also exploring academisation with us and may opt to join the new MAT in the future. Our joint and longstanding track record, supported by the infrastructure of the Teaching School and the governance of our proposed MAT, gives us the confidence that Linden Hill will be successful and sustainable from the outset. At the heart of our vision is the drive to provide outstanding, high quality education for SEND in our locality. Linden Bridge and West Hill Schools will establish the MAT no later than April 2017. Linden Hill will subsequently join this MAT. The MAT Board will be open to further special schools wishing to join from 2017 with 10 being the optimum number envisaged at this point. The 5 other special schools which have shown an interest are Woodlands, Brooklands, Clifton Hill, Chart Wood and Woodfield. The vision of the MAT is that as educational partners we will:

- Deliver an ambitious education that is tailored to the needs, interests and abilities of all learners with SEND, while maintaining the unique ethos and specialisms of each school
- Provide mutual support and challenge to raise standards and ensure education excellence across all schools
- Recruit, train and support outstanding staff and leaders, with exciting development opportunities at each stage of their career
- Work with families, professionals, the wider community and other stakeholders to secure aspirational outcomes and belief in a positive future for children and young people with SEND
- Ensure highly effective governance for all schools

Rationale for Linden Hill School

Response to Parental Demand and Local Authority Demand:

There is well evidenced demand from Surrey County Council for Linden Hill School, as outlined in their Commissioning Letter. Surrey County Council fully supports our application due to:

- The strong track record of Linden Bridge and West Hill Schools
- Our capacity to develop as a MAT of special schools
- Our Teaching School Partnership which will support the development & sustainability to Linden Hill and a provide a local high quality, cost-effective school offer, as an alternative to reverse the rising trend of children attending out of county NMI (non-maintained independent) provision

There is high parental demand evidenced by the Family Voice online survey consultation, and our parental engagement events.

Meet a Need for Places

There has been an alarming upward trend in pupils with autism who need a specialist provision, unplaced at the Surrey admissions forums, particularly at Reception. Linden

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

Bridge is full to capacity so the frequent ad-hoc placement requests made across the school year, outside of these forums, are usually unsuccessful. This results in children being placed in other provision, which is often not their first preference. The Surrey Autism Outreach Service in East Surrey also has data from pupils with autism attending mainstream schools, predicting an increasing need for places for pupils at Key Stage 2 or Secondary transfer to more specialist autism provision. Surrey County Council is not concerned about the quality of provision but that there is an insufficient number of maintained places to meet existing or future demand. As a result these pupils are placed in NMI provision at considerable cost. Linden Hill would mirror existing quality provision but would offer the opportunity to meet future demand with cost effective local places.

The DfE Autism Education Trust identifies that 25% of young people with autism do not go on to Further Education or training or employment. Surrey have identified that 15.8% with SEND are NEET, this is 8.1% lower than those without SEND. Linden Hill will enable pupil participation in quality education up to the aged of 19 and facilitate transition on to college or employment. At Linden Bridge over the last 3 years, only one pupil did not go on to further education or employment, but into appropriate social care supported living provision.

Linden Hill School's Vision, Values and Mission

We will:

- Provide a rich, relevant curriculum underpinned by specialist autism strategies to enable each individual to fulfil their potential and prepare them for life
- Promote the wellbeing of our school community and provide a safe, caring, quality learning environment, where everyone matters, and their rights and responsibilities are promoted
- Use our Teaching School designation to establish the school as a centre of excellence in the community for learners with autism, their families and multi-agency services

Linden Hill School's values will be: Aspiration, Diversity, Respect, Independence and Enjoyment. Our mission is to create an outstanding Specialist School, providing Education for Life, that will build bridges to independence to maximise outcomes and to enable our young people to have and fulfil high aspirations, overcome barriers to learning and become active citizens in their local communities.

Curriculum Learning Aims:

Our learning aims for our young people are:

1. To achieve maximum independence and community participation
2. To develop behaviour for learning and emotional regulation
3. To have functional social communication skills
4. To aspire to ambitious progress and achievement

1. Independence and participation

Through the TEACCH approach and a range of specialist-enabling teaching interventions, our pupils will become independent, resilient learners. Pupils will be well prepared for their destinations and life beyond school and supported in their transitions

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

by the school and multi-agency working. The design of our school will be crucial in creating a structured, enabling environment for learning and developing skills, which pupils will transfer into the community.

2. Behaviour for learning and regulating emotions

We will enable our pupils to recognise and self-regulate their emotions and manage the anxieties which are often associated with living with autism. We will support pupils to secure appropriate behaviour for learning to enable engagement and participation.

3. Developing functional social communication

We will develop spontaneous functional communication, including augmented communication to enable pupils to express needs, wishes and opinions and understand those of others. We will develop social skills and social understanding and empower our pupils to make sense of the social world in order to have fulfilling relationships and become active citizens in their communities.

4. Ambitious progress and achievement

Within a culture of ambition and high expectation, we will strive to ensure pupils make exceptional progress at each stage of their education in their academic attainment, functional and life skills and social and emotional progress. We will reduce barriers to learning via our specialist approaches and shape a highly relevant curriculum offer focussed on the key outcomes of independence, employment, healthy lives and community participation. Pupils and their families will have hope and aspirations for a positive future.

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 complete a separate table for each.

Fig D1.1: Phased Pupil Growth

Forums:	Pupils/Year	Sep-18	Sep-19	Sep-20	Sep-21
Reception Admissions Forum	Reception	8	8	8	8
	Year 1	+8	8	8	8
	Year 2		8	8	8
Key Stage 2 Admissions Forum	Year 3	8	8	8	8
	Year 4	+8	8	8	8
	Year 5		8	8	8
	Year 6		8	8	8
Keys Stage 3 Admissions Forum	Year 7	8	8	8	8
	Year 8	+4	8	8	8
	Year 9		8	8	8
	Year 10		4+2	8	8
	Year 11		6+2	8	8
FE Admissions Forum	Year 12			4	8
	Year 13			8	8
	Year 14				8
	TOTAL	44	74	96	120

Key:

Forum Entry Points 2018:	Forum Entry Points 2019:	Forum Entry Points 2020:	Forum Entry Points 2021:	Ad-hoc admissions

+ indicates ad-hoc admissions, where vertical groups may be formed across this age range to make viable teaching groups

The modelling in table D1.1 shows the build up to 8 per year group over 4 years. However, particularly in Secondary and Further Education, there are likely to be cross phase groups of mixed years in the 1st, 2nd and 3rd years. By year 4 we aim to have each year running at 8. At the point at which the school is full, entry at later admissions forums will be considerably limited, as most pupils will transfer through the school from entry at Reception.

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.

School Curriculum Subject / Activity	EYFS	PRIMARY Hours	SECONDARY Hours	Mand / Vol	FE Curriculum Subject / Activity	Hours	Mand / Vol
Literacy Communication and Interaction	6	6	6	M	English Functional Skills, Communication and Interaction	6	M
Maths	4	4	4	M	Maths Functional Skills	4	M
PSHE / Personal Dev	5	2	2	M	ICT Functional Skills	2	M
Science	2	2	2	M	Personal Development PSD / Citizenship	3	M
Knowledge and Understanding of the world, Humanities / RE		2	1	M	Expressive arts – Carousel of Art, Drama, Music	2	M
Art	1	1	1	M	Vocational Modules Including Science and DT	5	M
DT and Food Tech	-	1	2	M	Life- Skills including Community based learning	3	M
Music	1	1	1	M	Work Experience Placements *	2	V
ICT / computing	-	2	2	M	Employability Internship in workplace *	2 days weekly for a year	V
Physical Education	4	2	2	M	College Links*	3	V
Life – Skills / Community based learning	2	2	2	M	TOTAL:	25	
TOTAL	25	25	25		*Not counted in total		

Accreditation / Qualifications Framework 14 to 19

Qualification title	Type of assessment	Levels of Assessment
Functional Skills Maths, English, ICT	Exam at end of course Progression through levels	Entry Level 1, 2 and 3 & L1
LASER LEAP Award/ Certificate	Continual unit assessment of Life Skills and vocational work	Entry 3 Level 1
LASER Personal Progress, Award, Certificate, Diploma	Continual unit assessment	P Levels to Entry Level 1 For students who need a higher level of support.
LASER Independent Living Skills	Continual unit assessment	Entry Level 1 and 2
GCSEs may be offered where appropriate via inclusion links to local mainstream schools		

The School Day

9.15am to 3.15pm. We plan to operate within Surrey term dates.

A Typical School Day

9.15am Arrival and registration
 9.30am Lesson 1
 10.30am Morning break including play / leisure / snack
 11am Lesson 2
 11.45am 1st Lunch sitting Primary
 12.00 Play / Leisure Secondary and FE
 12.30pm 2nd Lunch sitting Secondary and FE – Play time for Primary
 1pm Lesson 3
 Flexible Break
 2pm Lesson 4
 3pm Class / Tutor time according to phase – circle time / reflection on day
 3.15pm Home

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

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

The Pupil Population

Fig D1.2 Current demographic - Pupil Population at Linden Bridge

Pupil Groups:				
	No of Pupils	School %	National Average	Surrey Average
EHCP / Statement	124	100%	-	-
Pupil premium	21	17.2%	26%	22%
Free School Meals	21	17.2%	26%	22%
English as a second Language EAL	13	10.6%	19.5%	11.6%
Minority Ethnic Groups	34	27.8%	30.7%	13.6%
Girls	12	9%	-	-
Boys	112	91%	-	-

Source: Linden Bridge School Data 2015/2016

Anticipated differences in pupil demographic

It is anticipated that the pupil demographic will not be significantly different to Linden Bridge School, as the cohort will be drawn from the same area of Surrey. Surrey data shows a lower than national average of pupils who qualify for pupil premium. The cohort of pupil premium is therefore likely to be between 17 and 22%. Pupils are drawn from all over Surrey where the socio-economic demographic is varied. Linden Bridge School has a higher than the Surrey average of minority ethnic groups. However, the current Surrey Census data indicates that the proportion of minority ethnic pupils within Linden Bridge is reflective of the wider CSCN population within Surrey.

Anticipated differences in our learners:

All pupils will have an EHCP. We anticipate a similar cohort of pupils in the new school in terms of learning needs and range. However, there is a planned increase in specialist provision for pupils with Communication and Interaction needs (COIN), and higher functioning autism in Surrey, in the form of three National Autistic Society sponsored “Cullum Centres” attached to Surrey mainstream secondary schools and a new COIN Free School proposal. There is also a drive to promote greater inclusive practice in Surrey mainstream schools using the Index for Inclusion. We would therefore anticipate a higher proportion of learners with autism who are on the more severe and complex learning need end of the spectrum at Linden Hill than at Linden Bridge. At Linden Bridge, we broadly classify our learners as formal and semi-formal learners (based on the work by ██████████ on the “Semi-Formal Curriculum”). See also our internal provision map in **Fig D5.1**. This will determine their learning pathway and the provision and arrangements made for them to access education and accreditation as they progress through the school.

Our semi-formal learners are the pupils who need highly personalised and specialist approaches due to their specific learning difficulties that need to be addressed as well as strategies for their autism. The semi-formal curriculum will be topic based to link learning and activities will be both visual and multi-sensory and follow a familiar structure. Most teaching will occur in small groups, pairs or individually in well-structured rotation of linked activities. Semi-formal learners are typically our primary aged learners and those older pupils working at P levels, who will work towards Personal Progress accreditation.

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

Whilst all our learners will benefit from specialist teaching approaches, catering to their strengths and learning style, due to their autism, our formal learners are learners who can learn by more conventional teaching methods. With adaptations to approach to provide structure and strategies, they can access learning as part of a group and with their peers. Their curriculum will follow more discrete subjects and be both knowledge and skills based. They may access standard national assessments for their age, follow programmes of study, and achieve Entry 2 and 3, and Level 1 accreditation. They may access supported mainstream inclusion to study a subject or for social reasons.

Currently the proportion of formal to semi-formal learners in Secondary and Further Education at Linden Bridge B is 60/40. However as we anticipate a higher proportion of pupils with more complex learning needs and autism. This would mean more pupils following the semi-formal curriculum and accreditation pathway in Secondary and Further Education at Linden Hill to overcome barriers to learning and fulfil their learning and life potential.

Curriculum principles:

Our philosophy is “Education for Life”, that “builds bridges to independence”. The Executive Headteacher will replicate the successful and effective Linden Bridge School curriculum and teaching approaches. A personalised, broad and flexible curriculum will be delivered through class-based teaching with an emphasis on communication, literacy, numeracy, personal and social skills, the arts, understanding of the world and cultural diversity, reflecting British Values. Free from the constraints of the National Curriculum we will provide a personalised and flexible curriculum offer to meet learner needs and to achieve their outcomes in terms of our priority learning areas:

- **Independence and participation**
- **Behaviour for learning and regulating emotions**
- **Developing functional social communication**
- **Ambitious progress and achievement**

With more pupils following the semi-formal pathway on through Secondary and Further Education, teaching will be more class based and learning linked through themes, topics and projects rather than the discrete subject model of the formal learner route. The Attention Autism programme will also run across the secondary school. There will be a need for higher levels of augmented communication, TEACCH structure and transactional supports to promote independence. We will equip pupils with secure functional skills in literacy, numeracy and ICT. Curriculum delivery will be highly engaging, using audio, visual, kinaesthetic and multi-sensory teaching approaches as appropriate to sustain attention, reinforce learning, and capitalise on the strengths and learning style of pupils with autism and more complex learning needs. Appropriate accreditation pathways will be offered at Linden Hill. However, there will be a greater proportion of pupils following an individualised Personal Progress accreditation route at Linden Hill.

There will not be a residential learning component to the education offer at Linden Hill, as there currently is at Linden Bridge. We will therefore need to plan a holistic offer, ensuring that pupils will have access to a range of appropriate enrichment activities, which are integral to the curriculum. Life and independence skills will need an increased focus within the school day at

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

Linden Hill. There are currently no plans for an extended day. In the third year of operation, we will aim to run voluntary after school clubs. We may achieve some economies of scale by planning enrichment activities and after school clubs across the schools in the MAT.

Consistency in approach to teaching and learning

As a hub for the DfE Autism Education Trust (AET), the self-evaluation framework and staff competencies will be common to both schools. The 'AET Staff Competencies' will direct our training and development offer for staff to ensure a consistently high level of autism knowledge and expertise. The Teaching School CPD programme will train staff in the required effective evidence-based teaching approaches. There will be a shared vision and clear philosophy for learning set by the Executive Headteacher. Modelling and sharing of expertise across Linden Bridge and West Hill will ensure consistency of approach. We will adopt a lesson study approach to teacher development, involving peer coaching, mentoring and feedback. Well-established Teaching School deployment of SLEs and Lead SEN practitioners will support colleagues to address identified development needs. Teaching and learning, assessment and curriculum policies, and systems for monitoring and self-evaluation will be shared and adapted from Linden Bridge and West Hill. The senior team and local governing body will rigorously monitor the quality of teaching and learning. The MAT standards committee will monitor educational standards and quality of teaching and learning across its schools and provide effective support and challenge.

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 the table below 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

Assessing progress and setting challenging targets

We will model the approach to baselining, assessment, measuring pupil performance and ambitious target setting on Linden Bridge School and refine the systems and processes across both schools. The approach is successful in capturing the crucial elements of pupil performance addressed by the school curriculum and ensures rigorous monitoring of progress towards agreed personalised targets and outcomes and swift intervention where needed. As well as tracking progress in academic skills

there will be an increased emphasis on assessment and target setting for pupils in terms of their:

- **Independence and participation,**
- **Behaviour for learning and emotional regulation,**
- **Functional social communication**

Fig D2.1 EHCP Outcomes, Targets & Assessment

Annual Review EHCP Outcomes	IEP targets	Assessment:
<p>EHCP Outcomes Communication and Language: Functional Social Communication</p> <p>Cognition and Learning: Skills for successful learning Maths, English, academic progress</p> <p>Social, Emotional and Mental Health: Emotional Regulation / Behaviour Health outcomes</p> <p>Physical and Sensory Physical and sensory needs</p> <p>Transition and Independence: Independence and participation,</p>	<p>IEP SMART targets set and evaluated termly in pupil online progress tracker “Essential Steps to Independence”</p> <p>Evidence of progress collected and linked to targets on system</p> <p>Reviewed and evaluated half-termly</p> <p>Parental access to online to share progress information and enable them to input</p>	<p>EYFS (Yr R and 1) Baseline - Development Matters areas Phonics screening assessment TEACCH baseline assessment and profile Baseline– Functional Social Communication, Behaviour for learning / Emotional regulation, Independence and participation Speech Therapy / OT assessment and review</p> <p>Semi-formal Baseline Maths and English from P Levels TEACCH assessment Assessment – Functional Social Communication, Behaviour for learning / Emotional regulation, Independence and participation SCERTS IEP targets and evidence collecting (on-line progress tracker) Speech Therapy / OT assessment and review</p> <p>Formal Baseline Maths and English from Milestones SATs where appropriate TEACCH Assessment IEP targets and evidence collecting (online progress tracker) Assessment – Functional Social Communication, Behaviour for learning / Emotional regulation, Independence and participation SCERTS Identify gaps in skills using Wechsler Individual Achievement</p> <p>14-19 Baseline in Functional Skills, Maths English, ICT Options for Laser Units – leading to qualifications SCERTS assessment – Functional Social Communication, Behaviour for learning / Emotional regulation, Independence and participation Independence and participation assessment to include Travel training / community access, Independent living skills, Employability profile - (AET progression framework)</p>

Ensuring Consistency in approach to assessment, target setting and behaviour

In the absence of current national data sets (progression guidance) and suitable commercial holistic packages, we will develop our own summative assessment, progression frameworks in our key learning areas, across both schools and Linden Hill, building on the initial research on using the SCERTS framework to set social and emotional and communication IEP targets at Linden Bridge. We will create our own

online progress tracking information system – “Essential Steps to Independence”. This will ensure that as well as assessing and setting ambitious progression targets in terms of P levels, milestones and functional skills for Maths and English, we will be able to do so for our key learning aims. This will address and overcome the challenges faced by young people with autism to ensure they reach their full potential and achieve the best possible outcomes in terms of independence, employability, healthy living and participation in society, as described in the SEND Code of Practice 2014. This system will also build a cumulative record of achievement, enabling staff to upload work samples, photographs and comments, which evidence progress against outcomes. Work has already begun on developing this bespoke online system at Linden Bridge and West Hill. As part of the assessment policy, we will set out target outcomes and articulate progression expectations for the exceptional progress we aspire to for our pupils in terms of academic progress, independence and participation, functional social communication, and behaviour for learning and emotional regulation. Whole school key performance indicators will be set and monitored annually in terms of proportion of pupils expected to make above expected and expected progress, achieve accreditation, and make successful transitions that fulfil their aspirations.

We will share policies, approaches and systems across each school including:

- The whole school teaching learning and assessment policy
- ICT based assessment, tracking and information system – “Essential Steps to Independence”
- Termly assessment data drops reviewed across both schools
- Moderation across schools and other regional schools with similar needs in Surrey
- Behaviour for learning policy and approach to developing support plans and recording and responding
- Systems for liaising with and reporting to parents
- Training and staff development in using these systems
- Monitoring, review and intervention by the Standards and School Improvement Committee of the Trust.

The MAT Standards and School Improvement Committee and the CEO will:

- Provide expertise and guidance to the board of directors in the determination of the educational strategy
- Ensure that research and innovative educational practice continually ensures best practice in assessment
- Monitor standards of teaching and learning, staff appraisal and performance in terms of impact on pupil progress
- Monitor the effectiveness of the school improvement plan in terms of its impact on pupil progress and outcomes via KPIs
- Scrutinise and monitor educational standards across its schools, whole school targets, progress data, performance of pupil cohorts, including those eligible for

pupil premium. Challenge variance between schools

- Ensure effective planning and targeted deployment of resources to support pupils or cohorts vulnerable to under achievement, including those eligible for the pupil premium
- Provide a forum for challenge and support to drive school improvement across the schools in the Trust

Local Governing Body will:

- Monitor and review the effectiveness of the teaching, learning and assessment policies in securing best outcomes
- Monitor whole school assessment data, including reviewing progress of cohorts and groups including those pupils eligible for pupil premium, ensuring no group in disadvantaged
- Monitor the KPIs of the School Improvement Plan
- Provide challenge and hold the Executive Headteacher to account within the school

Executive Headteacher will:

- Conduct and update the termly the Self-Evaluation report
- Report on assessment and progress to LGB via the Headteacher report
- Set the School Improvement plan with the Senior Leadership Team and Governors, including KPIs for pupil progress and outcomes
- Report on the school improvement plan KPIs to the Standards and School Improvement Committee and CEO
- Oversee and be accountable for quality teaching and learning and assessment and report on progress and standards to the CEO and MAT Board
- Review and develop the effectiveness of policies and procedures with the SLT and Governors

The Head of School will:

- Compile the annual pupil progress and achievement report
- Monitor termly assessment by teachers with Assistant Headteachers
- Ensure induction and training of staff in effective assessment and application of the policy
- Organise in school and cross school moderation
- Identify and monitor pupils vulnerable to under achievement
- Set and evaluate the pupil premium plan with the SLT

Assistant Headteachers will:

- Fulfil the role of SENCO
- Run EHC planning meetings for pupils in their phase
- Create costed provision maps for pupils, and monitor their impact
- Devise and monitor intervention plans for pupils vulnerable to under performance
- Monitor behaviour and effectiveness of interventions
- Monitor assessment practice by teachers across their department
- Develop curriculum and assessment including accreditation offer and standard

national tests for their phase

Teachers will:

- Set and evaluate termly IEPs towards EHCP outcomes, in liaison with therapists, parents, pupils and other agencies
- Devise learning passports to outline needs and interventions for each child
- Conduct on going formative assessment to adjust teaching and level of challenge
- Conduct termly summative assessment updates in the key areas, and link evidence of progress, such as photographs and work samples
- Keep the online tracking and information system “Essential Steps to Independence” up to date for their pupils
- Where there is an additional behaviour support need, devise behaviour for learning plans, plan strategies, record and monitor
- Provide pupils with feedback to help them understand how to improve
- Communicate regularly and conduct termly progress reviews with parents

Involving pupils and their families in decisions about their support ambitions and progress

We will fully adhere to the principles set out in the SEND Code of practice of involving young people and their family in decisions about their offer and support in order to achieve their aspirations. We will enable pupil's involvement in decisions, which affect them. Where they are able to, Students will chair their own annual reviews with the aid of an accessible agenda i.e. symbolised. Reviews include photographic or video footage of pupils achievements, developed with the young person and which they are supported to present. Where the young person is unable or unwilling to attend their views, interests, achievements and supports will be presented on their behalf. One-page profiles are developed with the pupils using person centred planning tools and presented in an accessible medium –i.e. symbolised or photographic. Parents and families are supported to make informed choices, about appropriate targets, type of support, study options such as. vocational modules, college links, work experience, ambitions and aspirations. We work across agencies to ensure education, care and health needs are all articulated in the plan. Transition planning from year 9 planning begins with regard to further education or employment aspirations, independent or supported living, participation including appropriate support and requirements for the young person to go on to live a healthy, happy and fulfilling life.

Where possible pupils will be supported to review their own progress, express their own targets and contribute to their own IEPs and records of achievement. Targets are presented to pupils in an accessible medium. Termly progress reviews will be held with Parents. Parents will have log ins to their pupils assessment, information and progress tracker system, “Essential Steps to Independence” and be able to review school assessment and to add their own evidence of progress and input comments. Parents and family members will be invited to attend class visits on our “Invite your family to school” days. A programme of Parent workshops including EarlyBird and Cygnet parenting programmes develop support strategies and interventions across home and school to maximise progress.

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.

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

Organogram of Staffing - Appendix D3.1

D3.1 Organogram of staff structure for Linden Hill (full capacity)

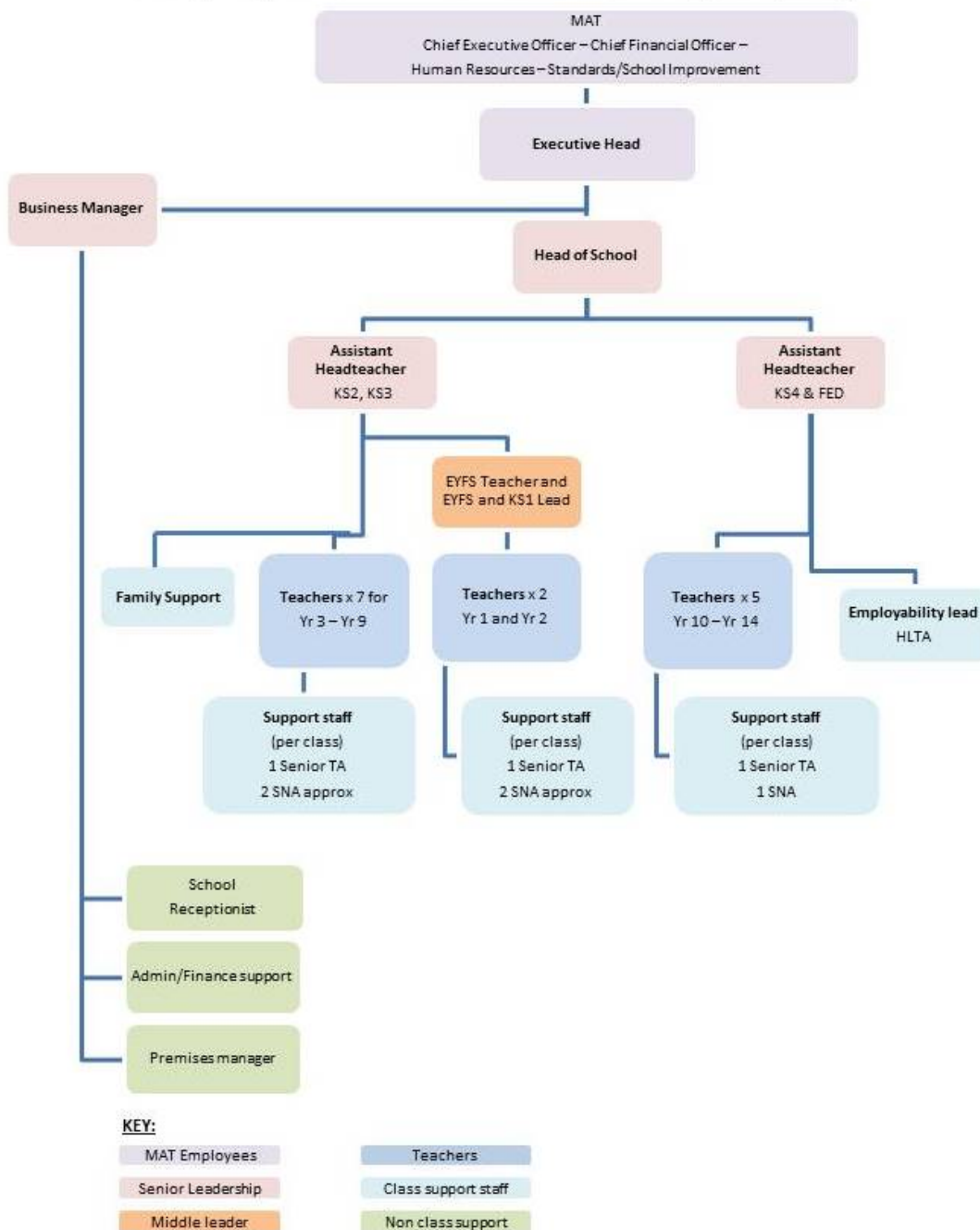


Fig D3.2 Phased Staff Growth

Staff	Year 1	Year 2	Year 3	Year 4
Students on roll	44	76	96	120
Leadership Team				
Exec Headteacher	0.5	0.5	0.5	0.5
Head of School	1	1	1	1
Assistant Heads / SENCO	1	2	2	2
Teachers				
Class Teachers	5	10	12	14
Class Support Staff				
Senior Teaching Assistants (level 2)	5	10	12	14
Special Needs Assistants (level 1)	8	12	15	20
Higher Level TA (level 3) Employability lead	-	0.5	1	1
Family Support worker	0	0.5	0.6	0.6
Total Teaching and Support Staff	20.5	36.5	44.1	53.1
Business Manager	1	1	1	1
Non Class - Support Staff				
Reception, Communications, PA	1	1	1	1
Admin and finance	-	-	1	1
Site Manager	1	1	1	1
TOTAL SCHOOL STAFF	23.5	39.5	48.1	57.1
Outsourced services				
Catering				
Cleaning				
Therapy Commissioned by Surrey				
Speech Therapist	0.5	1	1	1
Speech Therapy Assistant	-	0.5	1	1
Occupational Therapy	0.3	0.5	0.5	0.5

Our Staffing Structure will be grown in line with the phased pupil growth, until we are at full capacity.

The Leadership team will comprise of an Executive Headteacher managing Linden Bridge & Linden Hill schools, who is the current Head teacher at Linden Bridge School. Capacity will be created at Linden Bridge School by creating a Head of School post, and by reducing the teaching commitments of the two Assistant Headteachers to enable them to undertake additional leadership responsibilities. An increase in administrative support will provide a personal assistant role to the Headteacher and Leadership Team. At Linden Hill School, there will be a Head of School and two Assistant Head Teachers (AHT), one for the lower school and one for the Upper School. There will be an Early Years/Key Stage 1 Lead. Teachers will lead on subject areas and key areas of the school development plan. We will grow the staff to ensure that pupils in their first year have full access to education. The class staffing will increase with ease because most of the teaching will be class based rather than

subject specialist.

The Executive Headteacher, employed by and accountable to the Trust, will manage all preparations prior to the school's opening. A key responsibility will be to set the school's vision and strategic plan as set out above by ensuring an appropriate staffing plan, curriculum, admissions processes and other whole school policies, are in place for the first and subsequent intakes of pupils to the school as well as providing leadership and support to the Head of School. The Executive Headteacher will be responsible for assessing the effectiveness of school policy and processes reporting to the CEO.

The Head of School, accountable to the Executive Headteacher, will be responsible for ensuring that all pupils across all phases of the school achieve outstanding outcomes in the school curriculum, including academic, social, behaviour and readiness for the next stage in their learning. The Head of School will be responsible for effective line-management, securing quality first teaching, assessment and relevant CPD opportunities to ensure a highly skilled workforce. The Head of School will line manage the AHTs.

The Assistant Headteachers will have specific whole school responsibilities and deputise for the Head of School in their absence. The AHTs will have phase responsibility initially and importantly hold cross-phase responsibilities such as SENCO, curriculum and assessment and quality of teaching to ensure consistency of approach across the school. The AHT will line manage the teachers and identify priorities for school improvement. In the first years of opening, senior staff may have a higher teaching commitment than in 2022 to reflect growth.

We will comply with the teacher's Terms and Conditions but not be bound by them. We will comply with the Surrey Support Staff scales and pay structure to ensure parity across both schools and ultimately across the MAT.


Sharing staff across the schools

Other than the Executive Headteacher there are no plans to share staff across the schools. Expert staff from Linden Bridge and West Hill may deliver training and coaching mentoring to staff at Linden Hill, however. We also envisage promotion opportunities for existing staff to take up posts at Linden Hill.

Contingency plans

We fully expect to be fully commissioned from the outset, given the robustness of levels of need data provided. Surrey County Council has committed to fund the places outlined in figure D1.1 between 2018 and 2022.





Linden Hill's cohort will be taught in primary model-based classes. These arrangements would safeguard the curriculum by ensuring pupil access to qualified staff as an entitlement. Country-wide admissions forums take place almost a year ahead of pupil entry at Year R, Key Stage 2, 3 & 5 which would allow time to adjust staffing levels to allow for changes in staffing needs to be reflected in budget plans. Regular monitoring of budget spend to anticipate any further essential changes in staffing needs would ensure these are planned for well in advance.

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

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

Linden Hill's approach to promoting equality for all

Linden Hill welcomes every child with a diagnosis of autism. The common uniting feature for all children and their families at Linden Hill will be their autism and subsequent EHCP. Linden Hill will have no other restrictions to being welcome here. We welcome our duty under the Education and Inspection Act 2006 to promote Community Cohesion and we will ensure sure that no one experiences less favourable treatment or discrimination because of:

- age
- disability
- ethnicity
- colour or national origin
- gender
- gender identity or reassignment
- religion or belief,
- sexual identity and orientation

At Linden Hill, socio-economic circumstances will be taken into consideration and pupil premium grant funding will be used strategically and specifically to ensure that every child's outcomes are improved as a result. We anticipate that approximately 20% of pupils will be eligible for this funding. We will actively pursue our equality duties to eliminate unlawful discrimination and harassment, promote equality of opportunity, and promote good relations and positive attitudes between people of diverse backgrounds in all our activities. We will ensure that no person in their contact with the school receives less favourable treatment than others on any grounds, which cannot be shown to be justified.

Linden Hill's approach to promoting British Values

Linden Hill will promote the British Values of democracy, the rule of law, individual liberty, mutual respect and tolerance of those with different faiths and beliefs. It will be a UNICEF Rights Respecting School, promoting the general principles of United Nations Convention on the Rights of the Child (UNCRC) actively and having particular regard for the needs of children and young people and their parents and carers who are disadvantaged and vulnerable.

As a 'UNICEF Rights Respecting School' we will:

- Promote the rights of children from all religions and national origins
- Promote and teach the rights and responsibilities of all
- Promote understanding and engagement between communities
- Tackle discrimination
- Ensure that the curriculum addresses diversity issues

We will actively seek opportunities to engage with and cater for different communities and to provide activities and experiences for our pupils in the school curriculum, in order to prepare our pupils for life in a diverse society. This means we will deliver:

- Multi-cultural arts in the curriculum
- Curriculum, and curriculum resources, that reflect a diverse community and respect for British values
- Comprehensive PSHE curriculum, delivered to all
- Global theme days

- Visits to places of worship in each key stage
- A cultural calendar of activities, including celebration of festivals and visitors to the school from different communities and that ensure all elements of SMSC are valued
- Assemblies and circle time, differentiated by the needs of each cohort to reflect, celebrate or pray
- Menus to reflect specific dietary requirements through Surrey Commercial Services
- Support for pupils to observe religious observances e.g. Ramadan

We want all our pupils to be happy and feel safe and secure so they attend every day. We want them to feel they have choices, and recognise their own progress. We will therefore be inclusive for all by planning for, delivering and continually evaluating the quality of:

Knowledge of the pupils and their families and carers – a comprehensive induction programme including nursery and home visits, coupled with the provision of a dedicated Family Support Worker, will ensure that staff know pupils and their families and carers very well. Open discussion about difference and respect for home culture will ensure pupils and families feel valued for who they are and acknowledge the learning, which takes place outside school. Termly reviews with parents will ensure information is always up-to-date.

Behavioural policy and approaches - including anti-bullying and rights & respect agenda, which support pupils on their journey towards becoming contributing British citizens. We will use proactive specialist interventions and specialist teaching strategies to address the pupils' needs by enabling understanding and promoting social communication skills, self-regulation and supports, thus minimising the potential for behaviour difficulties arising. These approaches are set out in our policy.

Linden Hill and the Prevent Duty

Children and young people with autism are extremely vulnerable to all forms of suggestion and their innate anxiety, coupled with their lack of social awareness and norms, means that staff need to be highly skilled and vigilant in ensuring they are both safe from harm and helped to make sense of their world in an appropriate way. We have set out our principles below, which will guide staff in differentiating their approach, based on individual maturity, age and capability.

Treat extremism like other safeguarding issues: At Linden Hill, we treat extremism like other safeguarding issues such as drug abuse, sexual abuse, female genital mutilation, and pornography, gang involvement, bullying and cyber-bullying. As with these issues, we will contextualise the behaviour we are observing and to look at patterns of behaviour rather than one-off 'warning signs' and present it in a way that makes sense to individual pupils. This is not about spying on behavioural changes. It is about pre-emptively guarding those under our duty of care from harmful risks. Just as keeping an eye out for signs of sexual abuse is correctly perceived as proactive protection, rather than spying on the child, so too should safeguarding against extremism.

Build up emotional intelligence and critical thinking skills: We aim to teach pupils

how to be fair-minded thinkers, who think in a flexible and impartial way. This can protect them against the rigid, black and white narratives that characterise the thought processes of extremist groups. We already have a strong respect agenda at Linden Hill, which will enable us to continue to:

- Build empathy and tolerance for different perspectives to strengthen resilience to the pull of any extreme ideologies
- Support pupils to explore attitudes and experiences that are different to what they are familiar with
- Draw out empathy for different perspectives and build strong emotional and social skills

Facilitate open dialogue and honest realism: Maintaining an ethos and culture for open conversation about difficult issues is crucial for pupils at Linden Hill and is one we believe is critical for keeping them safe. If a pupil feels like their curiosity or understanding about something complex is not properly fulfilled, they may go elsewhere for information, which could be inaccurate or dangerous, especially given their vulnerability. Staff will help and support pupils in discussing these issues, allowing them to understand that people will have different opinions and this is something to be celebrated. We will continue to encourage openness and nurture pupils' curiosity. Where necessary, staff will try to correct misconceptions and misunderstanding on the facts surrounding controversial issues, but allow group discussion to unfold organically. We adopt an 'honest realism' approach when facilitating dialogue on difficult subjects. Frank discussion on current affairs will allow pupils to understand fact from fiction and how events have an impact on both themselves and the world. With open discussion some difficult questions could arise. Staff will not shut down such questions. Instead, they will enquire as to where the question is coming from in a non-judgemental manner. Staff will endeavour also to answer questions when they are raised rather than ask them to wait for the PSHE lesson, for example.

Increase pupil knowledge of extremism and its roots: Staff will use the existing curriculum to equip pupils with the appropriate understanding needed to be aware of extremist movements, for example in Time and Place, through PSHE, ICT and in tutor times.

Focus on digital critical thinking and internet safety: Pupils receive training in e-safety regularly, as their ability to use the internet in a safe way is the key to protecting them from becoming susceptible to all kinds of social media risks, including propaganda used by extremist groups. Their ability to discern what is propaganda and what comes from a legitimate source is a skill that not only will build their resilience to risk, including extremism, but will equip them with the critical thinking skills that are necessary on a day-to-day basis.

Increase awareness of propaganda: It is important to teach our pupils how to recognise and challenge the myths and misconceptions they will come across in everyday life, including conspiracy theories and extremist narratives. Extremist narratives may contain kernels of truth, but it is important that staff point out how these truths can be manipulated. Continuing this strain of critical thinking training will allow pupils to recognise what information to trust, for example in the media, and what information to take with a pinch of salt or disregard altogether. We believe this approach will ensure a degree of resilience towards extremist materials, as well as a broader competency in knowing where to find trustworthy information.

Encourage positive social activism: An often-cited reason for membership of extremist groups is that the individual concerned was struck by the desire to act in the world and wanted to engage with something meaningful. Staff will encourage all pupils to become socially empowered and politically engaged citizens. We will encourage active participation in the school and wider community and will teach pupils how they can become involved in influencing and affecting change in the world e.g. through participating in debate, mock elections and social enterprise activities.

Linden Hill's Approach to PSHE

Our enhanced PSHE programme will develop Students to participate in society and be active citizens in their communities. We will follow a comprehensive spiral PSHE curriculum which focuses on social context and social understanding covering:

- Social and Emotional Aspects of learning
- Sex and relationship education, including onset of puberty, privacy, consent and choice, sexuality, relationships, safety
- Citizenship education based on the UN Convention of the Rights of the Child and British values and social responsibility
- Healthy life styles – diet, exercise and personal safety, including e-safety.
- News and current affairs, including law and the political process
- Multi faith religious education that teaching understanding, respect and tolerance
- Specialist autism specific approaches such as Lego therapy and the “Special Friends programme to develop social communication skills
- Understanding and taking a positive view of their autism through programmes such as “I am Special”
- Life skills, community participation, vocational skills and employability

We will ensure consistent policies across Linden Hill, Linden Bridge and West Hill for Safeguarding including Prevent and E-Safety, Pupil Welfare, PSHE including Sex Education, and SMSC and Religious Education.

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

This section covers how your school will address the particular needs of children at the school.

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

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

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

How Linden Hill will meet the needs of all learners

It is anticipated that Linden Hill School will meet a broad range of learning needs for pupils with autism. However, our cohort will have additional learning needs and be significantly behind their age related expectation. As autism presents as a spectrum of needs, the school will be responsive to the range of pupil needs in terms of the provision and arrangements. This will affect the class groupings, class sizes, the staffing plan, the curriculum offer approaches, and the environment. The offer will therefore need to be responsive to the cohort in order to provide flexible learning pathways. We classify our learners as formal and semi-formal learners in terms of the provision and arrangements they need to be successful and make progress. All pupils will have unique learning passports, devised by staff and therapists, which will set out clearly the learning arrangements required to access learning, in terms of our key learning areas:

- **Independence and participation**
- **Behaviour for learning and emotional regulation**
- **Functional social communication**
- **Ambitious progress and achievement**

The learning passports will also highlight other needs and arrangements such as medical and health needs, specialist equipment, therapeutic input, safe from harm risk assessments, dietary needs, and cultural practices to be observed. Pupils with specific care or health needs will have a clear care plan. All pupils will have a Provision Map as part of their EHCP.

Linden Hill pupil groupings

We will group pupils broadly by age and within their key stage, taking account of their learning style, needs and compatibility. Class groupings will be flexible year on year to take account of the cohort and range of needs. Learners may follow a semi-formal or formal learner pathway. Class group sizes range between 6 and 9. We will create enhanced arrangements for some pupils who benefit from their own teaching space, where they feel safe, but with carefully planned phased integration to other pupils. We anticipate a similar approach at Linden Hill. The following provision matrix will support us in the process of identifying and planning these arrangements:

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

Fig D5.1 Provision Matrix for pupils at Linden Bridge and Linden Hill School

Level 1 provision	Level 2 provision	Level 3 provision
<p>Formal Learners Pupil are able to share engagement and attention as part of group or whole class Pupil seeks out and engage in social interactions with others Pupil can follow the structure and routines of the class / day with minimal support Pupil can apply themselves to work tasks / self-help with a level of independence Pupil can access the wider community of the school with minimal support appropriate to age Pupil can communicate their needs spontaneously verbally or using AAC Pupil has access to and can use emotional regulation supports Pupil can access intervention programmes which focus on functional learning across school, home and wider community</p>	<p>Semi-Formal Learners In order to access the curriculum and for personal development the pupil will require to be taught in smaller groups and may need some 1:1 or 2:1 teaching at times Pupil may require sustained specialist interventions to enable full access to the curriculum Pupils need support to engage in social interaction Pupil may require individualised multi- sensory delivery of curriculum throughout the day Pupil require support with care and self-help e.g. toileting, feeding, changing, dressing and medical needs on a daily basis Pupil needs extra support with transitions, to ensure safety within the school and wider community Pupils require a higher level of support to communicate their needs Pupil may have difficulties in regulating their emotions and may be on a Behaviour for Learning Plan Staff need to use alternative recording methods for most curriculum areas Pupil needs extra support to access intervention programmes which focus on functional learning across school, home and wider community</p>	<p>Semi-Formal Learners Pupil requires significant and highly individualised enhancements to the arrangements to access learning Pupil may have ENP (Exceptional Needs funding) or enhanced arrangements identified through their ECHP – i.e. Surrey Band 4 Pupil may have difficulties in regulating their emotions and may be on a Behaviour for Learning Plan Pupil may have high behaviour support needs such as planned physical intervention (MAPA) or use of calm safe space Pupil may need 1:1 support or higher to engage in learning / tasks / care needs Pupils may need frequent support with self-care with and / or high level of medical needs Pupil needs high level of supervision to ensure health and safety of self and others – Safe from Harm Risk Assessment Pupil needs significant adaptation to the learning environment – low arousal, secure spaces, own space Pupil needs significant support with transitions, to ensure safety within the school and wider community</p>
<p>Provision / Arrangements/ Staffing: Class size up to 10 pupils Teacher and TA Input from therapy as group for social use of language Access to Family Support Worker / other agencies as required</p>	<p>Class size 7 to 9 pupils Teacher, TA and additional SNAs according to need Specialist assessment and intervention from therapists equipment / interventions Access to Family Support Worker / other agencies as required</p>	<p>Smaller class size May frequently need own learning space Teacher, TA and any number of SNAs needed May have designated 1 to 1 support or more Specialist assessment and intervention from therapy as individual – equipment / interventions Access to Family Support Work / other agencies as required such as Social Care / CAMHs, etc.</p>

Meeting the needs of all groups

Analysis of pupil progress and attainment data will investigate any differences across groups, in order to identify any groups of concern and respond to ensure that no groups are disadvantaged at Linden Hill. See Section D2

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

Girls: Girls are likely to be in a minority, based on the gender demographic at Linden Bridge School and for the population of children with autism at large. Whilst we must be mindful not to gender stereotype, the interests and views of girls will be fully considered and planned for. We will ensure equal opportunities and advocacy for girls and ensure that the curriculum includes material that shows strong female role models. Where possible we aim to put girls in a class with other girls. Gender specific PSHE will support our girls in their personal development as they progress through adolescent. All pupils will be respected and supported in understanding their gender identity and sexuality.

English as a second language: For pupils with EAL we will explore their language in consultation with parents. The visual supports in the environment and augmented communication systems support understanding for pupils where English is an additional language. Translation service may be employed where parents do not speak English to enable their engagement.

Ethnicity and cultural needs: The cultural needs of pupils will be understood and planned for in consultation with their parents. This includes observation of any religious requirements such as prayer, clothing and diet. We will ensure that the curriculum is planned to reflect cultural diversity in its resources, such as pictures and materials and texts. The cultural calendar and RE curriculum celebrates all faiths.

Medical needs: We ensure that we can meet medical needs of pupils in line with DfE guidance “Supporting Pupils with Medical Conditions”. Pupils with medical needs will have clear care plans agreed with the relevant health professional and parents. There will be clear protocols for the transportation, labelling, storage and administration of medication. Staff will be trained in medication administration and in management of specific conditions such as epilepsy and diabetes.

Dietary needs: Pupils with autism may have specific dietary needs such as a gluten or dairy free. We will ensure that pupil’s specific dietary requirements are catered for, be this for health or cultural reasons.

Pupil premium: We will use pupil premium to ensure that no pupil is disadvantaged in their education and progress by their socio-economic circumstances. Pupil premium funding will be carefully planned and its impact monitored. At Linden Bridge School, pupil premium funding is used currently to fund the Family Support Worker post, support for enrichment activities, specific educational interventions, and specialist ICT. This provision is always reviewed according to need and to ensure greatest impact on identified desired outcomes.

Staffing: The AHTs will fulfil the role of SENCO, ensuring access to learning and progress for all pupils. Pupils vulnerable to underachievement will be identified via progress tracking and behaviour monitoring. The SENCO will convene team multi-disciplinary ‘team around the child meetings’ to forward plan and develop an enhanced IEP, which identifies support and interventions and monitor the impact.

Behaviour: Linden Hill School will have a clear detailed ‘Behaviour for Learning Policy’ and a ‘Touch and Use of Physical Intervention Policy’ and staff will be well trained. Some young people with autism may have behaviours which challenge us and act as barriers to their learning and social inclusion. These behaviours may be for a number of reasons: high anxiety, difficulty with emotional and sensory regulation, communication problems and difficulties with social understanding. We will view all behaviour as communication and we will support students to self-regulate by using positive interventions and strategies. We will employ a range of strategies to support pupil’s emotional regulation such as the 5-point scale, feelings cards, and visual strategies to show positive choices,

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

and a well-structured enabling environment with safe calming low arousal spaces. We will build positive and supportive relationships between pupils and staff, ensuring that pupils feel safe and valued. Individual learning passports and IEP plans will incorporate emotional regulation targets, strategies and supports. The curriculum will offer regular activities to reduce anxiety and support regulation, such as sensory circuits, sensory diets, movement breaks / physical activity, play and relaxation. Staff will be MAPA trained and skilled in de-escalation and safe physical intervention if required. Some pupils will have specific 'Behaviour for Learning Plans'. Incidents will be recorded, monitored and reviewed, in consultation with parents and other agencies where required.

Enabling Environment: The design of Linden Hill School will be key to creating an enabling environment. Structured classrooms with zoned work areas will enable autism-specific strategies to be used. Low arousal zones will support emotional regulation, enabling pupils to be well regulated and ready to learn. Both indoor and outdoor spaces will be structured and equipped to meet the needs of the range of children and age appropriate as they transition through the school. Play spaces will meet the sensory regulation needs of pupils and be designed to encourage interaction and social play. The use of recommended specialist equipment will be incorporated into all aspects of the school day, including visual supports, communication systems and OT specialist equipment and creative use of ICT.

Engagement with other Agencies: We will refer to and work with other agencies where required such as the EP service, CAMHS and Social Care. We will ensure as lead professionals that all appropriate agencies are involved and their role in supporting positive outcomes for the child clearly set out in the EHCP. The successful model of the Family Support Worker will be replicated at Linden Hill. Their role will be to engage with families, provide a point of contact and support, sign post parents, liaise with other agencies, plan the programme of parent visits, workshops and training, and support parents with strategies.

Attendance

Pupil Attendance at Linden Bridge School :			
Absence	2014 - 15	Current 2015 – 16	Target for Linden Hill
Authorised	5.3%	4.3%	4%
Unauthorised	1.1%	0.5%	0.5%

Linden Bridge School's attendance policy is highly effective in supporting high levels of attendance and access to learning. There is rigorous application to the policy, monitoring and reporting. The Family Support Worker routinely follows up on pupils where attendance is a concern. Pupils from vulnerable groups are particularly highlighted. Parents are encouraged through the policy to understand the impact of poor attendance on progress and outcomes. Holidays in term time are not authorised other than in highly exceptional or compassionate circumstances. Consequently, we have seen a reduction in pupil absence from last year. These strategies will be used at Linden Hill School to encourage and monitor attendance.

Safeguarding at Linden Hill

Linden Hill School will conduct an annual Safeguarding and E-Safety Audit and develop a

D5 – the particular needs of the children coming to the school have been carefully considered and will be met appropriately

safeguarding policy and safer working practices, which are reviewed at least annually in line with the DfE “Keeping Children safe in Education” guidance. The Safeguarding policy will be consistent across the schools and will:

- Ensure everyone who comes into contact with children has a role to play in safeguarding and adheres to safer working practices code of conduct
- Ensure rigorous recording and reporting systems
- Have clear roles and responsibilities
- Ensure safe recruitment of staff
- Deliver comprehensive and regular training and updates for all staff and governors
- Be monitored by the Governors

Therapy Provision

Speech and Language Therapy

Surrey County Council will allocate one full-time speech and language therapist and one full-time speech and language therapy assistant to Linden Hill School. Allocations will be reviewed annually to ensure that individual pupil needs are being met and therapy allocations are in line with pupil numbers. The speech and language therapist and assistant will be based in the school on a full-time basis, forming part of the school team. Linden Hill School’s therapy team will be required to deliver the service through the ‘Balanced System’ model, which is a tiered approach designed by [REDACTED]. The service provided will be evidence based and outcome focused, where all students within the school will benefit from a communication rich environment. The team will provide input to the training and development of teaching staff, development of resources specific to the needs of the students within the school and working in partnership with families. All students within the school will benefit from this universal approach. Some students within the school may benefit from a more targeted approach, which will involve time-bound interventions. Interventions may be 1 to 1 or group based and will be led or modelled by the school’s speech and language therapy team. A very small number of students within the school will benefit from a more specialist level of intervention, which is likely to require significant intervention by the therapist, either 1 to 1 or through group based work. Linden Hill School’s speech and language team will support students at key transition stages, particularly when they first start school or when they move on to their post-16 setting.

Occupational Therapy

Pupils at Linden Hill School will access the Surrey County Council occupational therapy service. In order to maximise the impact of therapy school staff will be trained in Speech and Language, OT and sensory needs to ensure pupil needs are well understood and appropriate interventions are well embedded.

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 this section 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

E1 – provide valid evidence that there is a need for this school in the area**Local Authority demand – the context in Surrey and the local response to growing need for CSCN provision**

Surrey County Council has identified the need (see commissioning letter in Appendices) to develop up to two new schools for children and young people with Complex Social Communication Needs (CSCN) living in Surrey (CSCN is a Surrey definition). The schools will cater for children at the more complex end of the autism spectrum, who cannot manage mainstream or specialist centre provision. This application is for one of those schools, catering for pupils in the East of Surrey.

Overview of the current provision for CSCN in Surrey

Surrey currently has two maintained special schools offering CSCN arrangements: Linden Bridge, located in Worcester Park (North East Surrey), and Freemantles, located in Woking (North West Surrey). The schools collectively provide 255 places for pupils aged 4-19. The majority of pupils placed in these settings have autism as a primary need, with 91% of pupils accessing Surrey CSCN schools having this identified need. It is evident from the data that both schools run at full capacity and will continue to do so as Surrey's population continues to grow. In general, the last three years has seen the demand for Surrey CSCN schools gradually increase from an average occupancy of 97.22% in 2012/2013 across the two CSCN schools to 100.19% in 2014/2015. This trend (at near full or at full capacity) has continued for the current academic year, with a current average occupancy rate of 99.04% across both schools. This is illustrated in Figure 1 below.

Figure E1.1 – Average Occupancy of Surrey CSCN Schools

CSCN School	Average Occupancy (%)			
	2012/2013	2013/2014	2014/2015	2015/2016
Linden Bridge (NE)	100	100.54 (LA increased PAN to 123)	99.59	99.59
Freemantles (NW)	94.44	100.53 LA increased PAN to 132	100.79	98.48
Average Occupancy	97.22	100.54	100.19	99.035

Source: SEN2 return, SCC, Performance and Knowledge Management

There is no specialist CSCN provision in either South West Surrey or South East Surrey.

Linden Bridge School

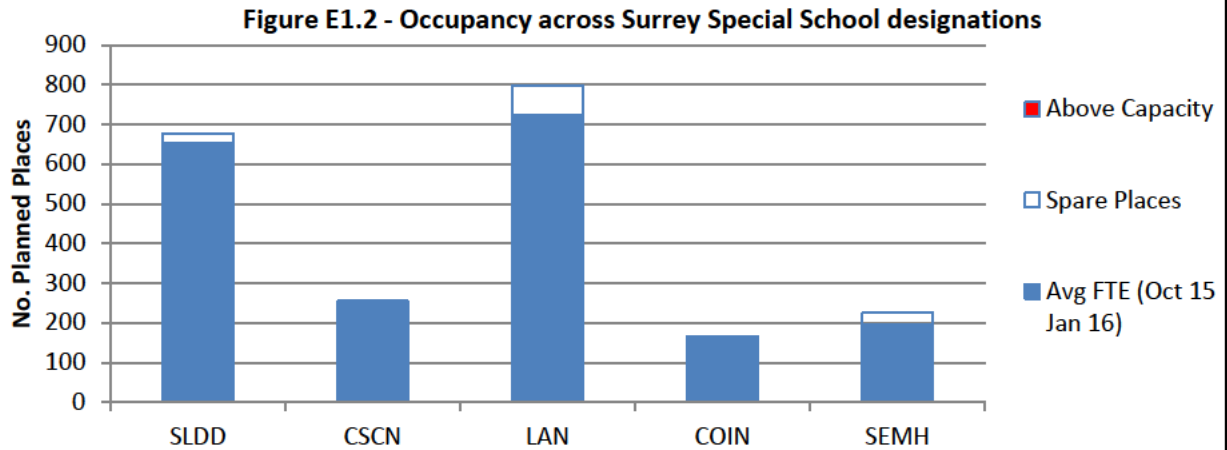
The school had 123 planned places for academic year 2015/2016, which has remained constant and will do so into the future. In 2013 the PAN was increased from 117 to 123 to accommodate a growth in demand for Further Education places, and this reflects the inability to increase numbers due to the size and limitations of the school site. As an exception, Linden Bridge has been required to accommodate a bulge class in Reception in 2016 as a result of the changing demographics which demonstrate an escalating and on-going need. The school continues to operate at full capacity.

Provision for pupils with complex autism

Many of Surrey's Severe Learning and Development Difficulties schools also cater for pupils with complex autism, with around 22% of pupils with autism as a primary need placed in these schools. The majority of Surrey SLD schools run classes that cater specifically for pupils with complex autism. These classes enable teaching to be conducted in a low distraction environment best suited to the needs of the pupils. Similar to Surrey CSCN schools, these schools tend to operate at capacity, providing

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

only a small number of vacancies. Some of these students would be better placed in specific CSCN provision were it available and we would expect Linden Hill to be named on their EHCP in the future. The occupancy of Surrey's special schools is illustrated below in Figure E1.2 below, split between the specific designations.



Source: SEN2 return, SCC, Performance and Knowledge Management

Changing profile of SEND in Surrey

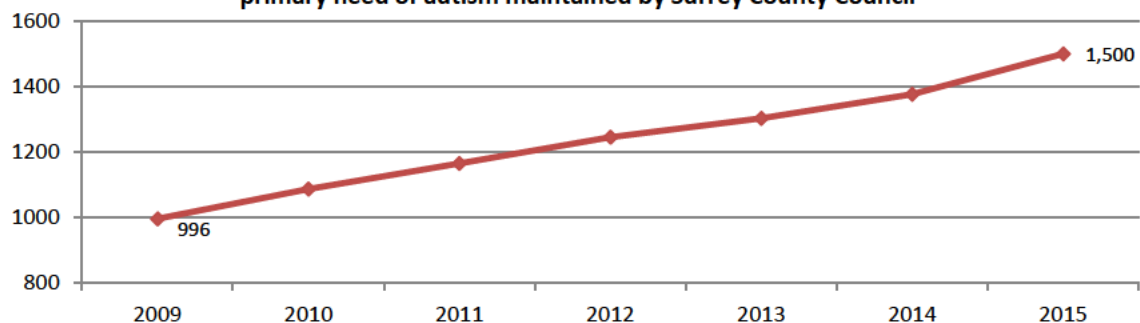
Demand for all SEND services is growing in Surrey as a result of demographic change, an increasing level and complexity of need amongst children and young people with SEND, and growing expectations from parents and families. To respond to this, Surrey County Council is working with partners to deliver its SEND 2020 project, to ensure the local offer to children and young people with SEND in Surrey is the best it can be. CSCN Free School developments are seen by Surrey County Council as a key part of how this can be achieved, alongside other approaches including:

- increasing inclusion and developing specialist centres in mainstream
- re-designating and developing special school provision where needed
- strengthening SEN Support and early intervention
- working with NMI providers who offer good value for money.

Since 2009, the number of children and young people with a Statutory Plan has increased by 7.5% from 5,238 to 5,631, exceeding national and statistical neighbour growth trends over the same period. Although this is partly due to overall demographic growth of 4.9% in the county over the same period, it is clear that the level and complexity of need amongst the Surrey cohort of children and young people with SEND is also increasing. Alongside these changes, the profile of diagnosed needs has also been shifted, with the most significant growth area being children and young people with autism. Overall, numbers with autism as their primary need have increased by more than 50% between 2009 and 2015 (from 996 to 1,500). Although each individual will have different needs, many of these children and young people will require specialist CSCN provision to help them to have a successful and fulfilling experience of education, as they move through childhood, into adolescence and prepare for adulthood. The number of children and young people with statutory plans and a primary need of autism maintained by Surrey County Council is illustrated below in Figure E1.3 below.

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

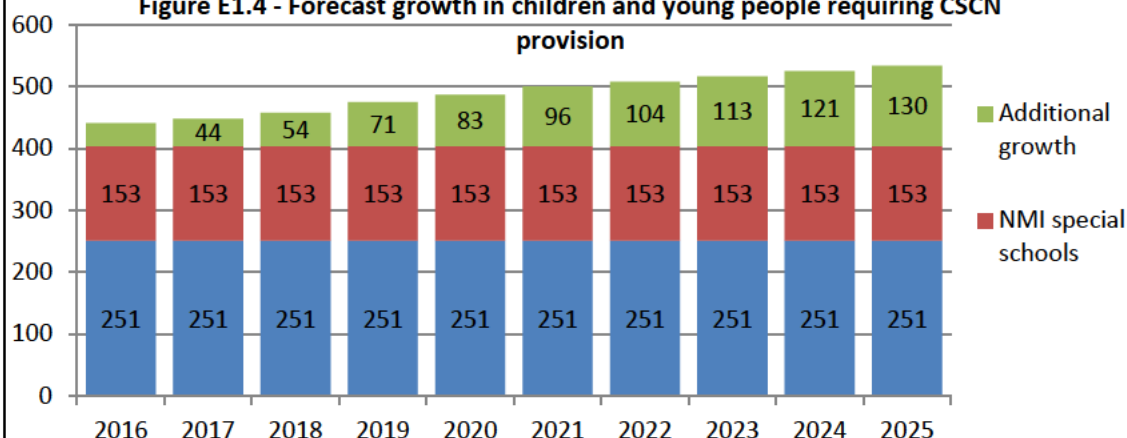
Figure E1.3 - Number of children and young people with Statutory Plans and a primary need of autism maintained by Surrey County Council



Source: SEN2 return, SCC, Performance and Knowledge Management

The forecasted growth in children and young people requiring CSCN provision is illustrated below in the Figure E1.4 below.

Figure E1.4 - Forecast growth in children and young people requiring CSCN provision



Source: SEN2 return, SCC, Performance and Knowledge Management

Forecasted growth in need for additional CSCN provision

Around 250 children and young people currently access CSCN provision in Surrey maintained special schools and over 150 are placed in CSCN provision in NMI special schools. If it is assumed that the numbers accessing these provisions remain constant until 2025, Surrey County Council forecast that there will be approximately 130 additional children and young people requiring CSCN provision by 2025. In addition the usage of NMI provision in Surrey is significantly higher than other comparable local authorities, so more CSCN provision is required.

Further evidence that current maintained CSCN provision in Surrey is at capacity

At the CSCN placement forums in November 2015, it was evident that there are significant demands on Surrey's current CSCN provision, in particular on primary provision, where 40 were not able to be placed within this provision at Reception. There is therefore an increased likelihood that these pupils will move to NMI provision through both primary and secondary phase of their education.

Infant-aged pupils: Of the cases discussed at the panel for a September 2016 placement, over 40 required a special school placement at reception but there were no vacancies for them. This was despite 8 additional places at West Hill School, which is changing its designation from secondary to primary to respond to increased need. A further 29 children have since been accommodated at Linden Bridge and other special schools. These schools now have no further capacity. There remain at least 11 children still unplaced for September 2016.

Primary-aged pupils: Of the 11 primary-aged cases discussed at the CSCN panel, 6

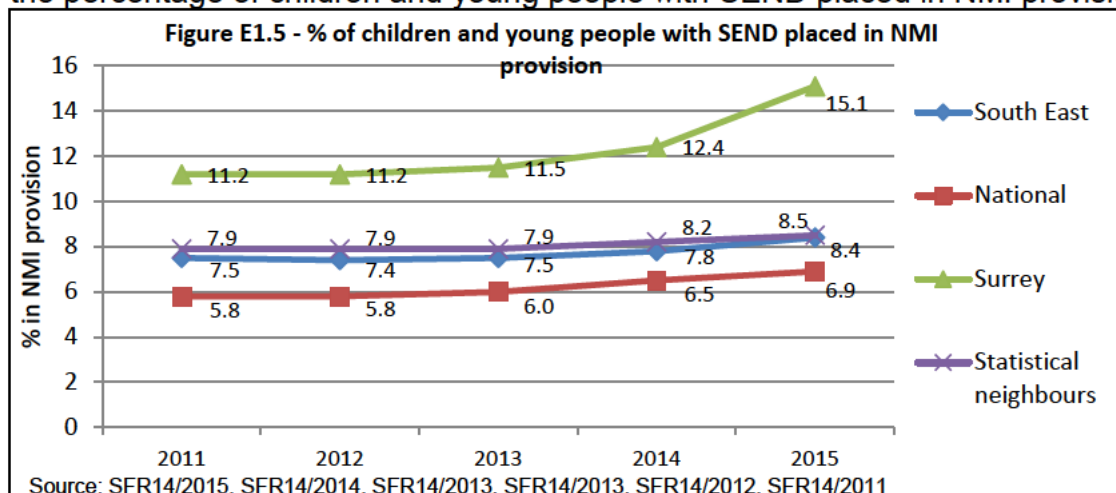
E1 – provide valid evidence that there is a need for this school in the area

required a special school CSCN placement but there were no appropriate school placements for them.

Secondary-aged pupils: Of the 14 secondary-aged cases discussed at the CSCN panel, only 8 were offered a special school placement.

By the age of secondary transfer, parents are faced with the fact that there are no vacancies at either of the two CSCN schools, as they are all-through provisions. This is clearly illustrated in Figure E1.8, which lists the numbers of ad-hoc approaches by Local Authorities for places by year group and which shows far fewer approaches after Year 7 as there is significantly less chance of there being a vacancy. This considerably limits parental choice, which contributes to the earlier ‘race to a place’ culture facing these schools and parents wanting specialist CSCN provision. It results in prohibiting those parents of children who can or have had to manage in primary mainstream with support from the Linden Bridge School’s outreach service, from securing a specialist placement for their secondary schooling or at another appropriate time.

NMI placements: Looking overall in 2015, 15.1% of children and young people with Statutory Plans in Surrey (850) were educated in the NMI sector, up from 11.2% in 2012. This is more than double the national average of 6.9%. The recent growth in autism has made a significant contribution to this over-reliance of NMI placements, with autism being the most prevalent primary need amongst those accessing NMI provision. Surrey County Council’s strategy reduce its NMI usage to align with regional averages. One explanation for high NMI demand is that because there are insufficient school places in in local specialist CSCN provision; the parental preference for type of school is not being offered and parents are unhappy with alternative local authority offers, such as enhanced support packages in mainstream or other designations of special school e.g. moderate learning difficulties or SLDD. Hence parents pursue NMI placements to meet their preference for specialist CSCN. In addition, where the local authority have agreed that a specialist CSCN provision is what is required to meet need and yet no place is available in a Surrey CSCN school, the local authority then seeks an equivalent NMI place in specialist CSCN School. Figure E1.5 illustrates the national, regional and local Surrey situation (including statistical neighbours) relating to the percentage of children and young people with SEND placed in NMI provision.



Surrey data (March 2016) shows that 136 children and young people are currently placed in day CSCN provision at NMIs and 28 are in residential placements, a total of 164. Day placements cost on average £57,000, although they range from around £24,000 up to £230,000. The average for residential placements is significantly higher, around £177,000, and these range from £58,000 to around £330,000. Surrey County

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

Council's forecasts indicate that the needs of children and young people to be met will require free school places funded at Band 3 (£10,000 plus £7,695 top up – see Surrey County Council commissioning letter), costs which are substantially less than the average of NMI placement. Alongside greater usage of NMI places, Surrey County Council also has higher placement costs than other LAs in the SE region. Data collated as part of the 'South East Together' project and published in December 2015 suggests that Surrey County Council has a higher average spend per NMI placement than other LAs in the region: £54,145 compared to the SE average of £40,296. When looking solely at placements for children and young people with autism, Surrey County Council's average placement cost is even higher, at £58,578, which compares to the second highest average of £31,835 in Kent. As well as the financial case, Surrey County Council aims to educate more of its children and young people with SEND closer to home, as evidence suggests that this leads to better, more sustainable outcomes for children, young people, families and communities. Data from January 2016 shows that 66 of the 164 children and young people in CSCN NMI were placed in provision outside of Surrey. Linden Hill School will enable Surrey County Council to offer more children and young people and their families local, high-quality CSCN provision. Figure E1.6 below illustrates the number of children in NMI placements by area quadrants in Surrey, as of March 2016. Linden Hill will support children in North East and South East.

Figure E1.6 - NMI placements by Surrey quadrants as of March 2016

Quadrant	NE	SE	NW	SW
	37	60	39	40
Total	97		79	

Source: SEN2 return, SCC, Performance and Knowledge Management

The East Surrey Outreach service from Linden Bridge School estimates that, of the 401 pupils it supports in mainstream primary schools, 47 will or do require specialist CSCN provision, as illustrated in Figure E1.7. The data shows that current CSCN provision is at capacity and there is therefore a strong possibility that these pupils will need to access NMI provision to have their needs met. Linden Hill will offer an attractive local alternative.

Figure E1.7 – East Surrey Outreach pupils who will require CSCN provision

Year group	Number
Reception	7
Y1	13
Y2	4
Y3	7
Y4	10
Y5	4
Y6	2
Total who will require specialist CSCN provision	47

Total on East Surrey Outreach database	401
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Source: Surrey Autism Outreach Service Data 2016

Therefore, both in terms of achieving better outcomes for children, young people and families and addressing financial pressures, Surrey County Council sees these proposals as a key part of its commissioning strategy to develop sustainable provision that meets the needs of children and young people into the future.

E1 – provide valid evidence that there is a need for this school in the area**Participation in education and training post-16 for young people with SEND**

Although Surrey has one of the lowest overall rates of young people aged 16-19 who are not in education, employment or training (NEET) in the country, the level of participation amongst young people with SEND compares less well with other areas. In 2014/15, 15.8% of young people with SEND were not known to be participating in education or training. This was the third lowest of Surrey's 11 statistical neighbour local authorities and was 8.1 percentage points worse than the rate of known participation of young people without SEND. Surrey County Council is keen to reduce this gap between those with SEND and those without and Linden Hill will support higher participation rates amongst young people requiring CSCN provision.

The demands from parents and young people for the school**Ad-hoc requests for places at Linden Bridge, September 2015 - July 2016**

The demand for primary special school places in East Surrey is illustrated by the number of unsuccessful applications made to Linden Bridge owing to lack of places - outside of Admissions Panel, as shown in Figure E1.8

Fig E1.8 – unsuccessful applications for places at Linden Bridge. Requests which fell outside of placement forum made directly to the school

Year	North East	South East	Other LA	Totals
R	6	0	2	8
1	4	5	1	10
2	3	2	0	5
3	5	3	2	10
4	4	2	7	13
5	4	0	1	5
Total Primary	38		13	51
6	2	1	2	5
7	1	2	3	6
8	0	0	3	3
9	0	0	1	1
10	0	0	1	1
11	2	0	2	4
Post 16	1	1	0	2
Unknown	1	0	2	3
Total Sec / FE	11		14	25
Total	33	16	27	76

Source: Linden Bridge Placement Request Data 2015/2016

New CSCN primary provision at West Hill School

New primary CSCN provision at West Hill School (8 places) is full for September 2016. In addition, 7 new-to-Surrey autism nursery places have been accepted by parents for January 2017 at West Hill.

Engagement with Parents

The Appendices shows the ways we have engaged with parents and the wider community through a dedicated website and survey. By the mid-September there were 332 responses to the survey, facilitated by Family Voice Surrey. Following the survey a number of parents attended parent engagement events to explore ideas for Linden Hill. Parent feedback supports a specialist curriculum approach over traditional national curriculum subjects. Linden Hill will build on the very best of practice at Linden Bridge School, cited in "Twelve outstanding special schools: Excelling through inclusion" Ofsted 2009, to ensure a continuum of outstanding CSCN provision in East Surrey.

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



E2 – valid evidence of need for non-statemented pupils/pupils without an education, health and care (EHC) plan

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 – valid evidence of need for non-statemented pupils/pupils without an education, health and care (EHC) plan
[Add text here. Table expands]

Section F – capacity and capability

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)	Role(s) (pre-opening team, member, trustee, principal designate, local governor once school is open)	Summary of relevant expertise Please refer to the relevant section of the assessment criteria booklet to check what detail you need to give	Available Time (hours per week)
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	10 hours
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	1 hour
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	20 hours
[REDACTED]	Surrey	Trustee of MAT – Chair of Standards and School Improvement Pre-Opening Team	[REDACTED]	5 hours
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	10 hours
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	5 hours

[REDACTED]	Surrey	[REDACTED]	[REDACTED]	4 hours
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	5 hours. 15 hours to the point of opening
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	2 hours
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	1 hour
Local Governing Body of Linden Hill			To be identified and appointed. Some Governors may come from current schools in MAT. Will also identify two Parent Governors and a Local Community Governor, possibly a local Councillor.	
[REDACTED]	Surrey	[REDACTED]	[REDACTED]	

F1 (a) Skills and experience of your team

It is recognised that Members and Trustees of the MAT will initially provide more time in advisory roles as both the MAT and the Free School are established. The roles will become more conventional after the first 2 years. A pre-opening team will be set-up to work on the creation of Linden Hill School. This core team is identified above and skill gaps are noted in F1(b). The above team has extensive Executive, Financial, Human Resources and Education experience across both Public and Private Services.

The vision for the school is outlined in Section C. The CEO will be selected from the Heads of the initial schools in the MAT. It is expected that [REDACTED] will take on the role of [REDACTED] while the MAT is established. A formal recruitment process will be undertaken when the Trustees deem it appropriate. [REDACTED]

[REDACTED] and [REDACTED] will report to [REDACTED] on a part-time basis moving to full time as the MAT grows and a successor recruited. West Hill's senior team have excellent leadership capacity, all having NPQH or NPQSL. Linden Bridge has an equally experienced senior team. [REDACTED] will undertake the National Professional Qualification for Headship to enable her to apply to the position of acting Head of School, reporting to [REDACTED]. A formal recruitment process will take place to appoint Heads of School at both Linden Bridge and Linden Hill, the latter as the school expands.

There will a major staff recruitment exercise to create Linden Hill. Both [REDACTED] and [REDACTED]. Additional professional expertise will be bought in through consultants. Currently the schools buy services from Babcock 4S and this will continue until there are sufficient schools and resources in the MAT to appoint a Human Resources Director. The HR Director will support the whole MAT, including Linden Hill. S/he will co-ordinate the recruitment of teaching and support staff at Linden Hill alongside the Executive Head. Appointment of Headteachers will be made by the Board and involve local governing bodies through the formation of an appointments panel. Senior Leaders will be appointed by Local Governors. [REDACTED] will be responsible for school standards. He will provide the structure for driving educational outcomes. He will be supported by input from other Members of the MAT as advisors who are specialists in their fields. [REDACTED] will work closely with the CEO and Executive Head providing strategic guidance, setting targets and monitoring progress and outcomes.

The Pre-opening team will appoint a Project Leader. This individual has not been identified. Advice will be sought from SGOSS Governors for Schools, Academy Ambassadors and the education and Employers Task Force to help draft a job specification. This role will be a contract role which will be required during the first 2 years and may well be part-time. The new Local Governing Body of Linden Hill may draw on experienced governors from the other two schools in the MAT at the outset. It will also look for a Community Governor drawn from the area of the site of the new school. Parent Governors will be on-boarded as students enter the school. Various agencies like SGOSS will also be contacted to assist with finding Governors with relevant skills and experience. All Governors will be expected to engage with the NGA and to keep their training up to date. Initially [REDACTED], [REDACTED], will step up to become [REDACTED], and a new Chair of the Local Governing body identified.

The capacity required to open Linden Hill has been carefully considered. [REDACTED],

F1 (a) Skills and experience of your team

████████████████████ are all retired and will therefore be able to provide between 10 and 20 hours a week during the first two years at the key times of pre-opening and opening. The CEO will move into full-time roles as Linden Hill and MAT become established. The Executive Head will commit 0.5 of her working week across each school. The succession planning was identified above. Advisors from the MAT Members and additional advisors like lawyers, architects etc. will be utilised to support this core team. As the MAT becomes established during 2017 it will have support staff appointed to key centralised roles of Finance Manager, HR Manager, IT Manager and Premises Manager all reporting to the CEO. The Headteachers of the MAT will report to the CEO. When this structure of centralised employees is established they will support Linden Hill and the pre-opening team commitment will diminish.

The CEO will utilise policies already in existence in the MAT schools to develop Linden Hill policies. The CEO will become the Accounting Officer for the MAT. All staff will report ultimately to the CEO and she will be responsible for across the MAT staff appraisal, performance management, and remuneration through the Executive Heads and Heads of Schools in consultation with the Local Board of Governors.

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
Legal Skills	Pre-opening and creation of the MAT	As soon as approval is given the funds will be used to appoint a legal advisor. We have three potential known legal firms and will prepare a 'Request for Proposal' questionnaire to assess their bids. [REDACTED] has extensive experience in services procurement and will also use experience of other Trustees and Members. This will be completed by December 2016.
IT skills	Pre-opening and creation of the MAT	The Business Managers have day to day responsibility for IT. Currently both schools have consultants who assist with strategic planning. An IT consultant would be engaged once the Free School is approved. The position would help develop a joint schools IT strategy and determine a standardised IT infrastructure across the schools. It will also assist with developing a centralised administrative IT function, helping to ensure strong financial controls across the MAT.
HR skills	Pre-opening and creation of the MAT	An HR consultant would be engaged when approval to create the MAT and Linden Hill is agreed. Schools currently commission Babcock 4S and this will continue until MAT capacity grows and our own consultant is appointed. The consultant will support the Board. Many Trustees and Members have held senior positions in large organisations and have clear understanding of resources and HR management. Additional Trustees are appointed there is a desire to appoint a qualified CIPD specialist with pension's experience. There will be a need to appoint pensions advisors by December 2016. [REDACTED]

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
		has experience in a similar exercise and is familiar with the Surrey County Council pension fund as a former [REDACTED]. [REDACTED] will draw on the experience of other Members and Trustees.
Project management	Pre-opening and creation of the MAT	While many of the Trustees and Members have project management skills it was decided that an additional resource would be appointed to work on a fixed term contract when approval to create the MAT and Linden Hill is agreed. An audit of skills of existing Members, Trustees and school governing bodies to be undertaken in September, will ascertain if capacity exists internally. If not, the role will be advertised externally. The aim is to have the individual employed before December 2016.
Linden Hill Local Governing Body	Pre-opening and creation of the MAT	While some current Governors may be interested in joining Linden Hill LGB a recruitment drive and a skills assessment would be performed contract when approval to create the MAT and Linden Hill is agreed. Various agencies such as SGOSS and ETeach will be contacted to assist in finding governors with relevant skills and experience
Parent representation	Pre-opening and creation of the MAT	Parents will be represented on local governing bodies. Surrey Family Voice will continue to be consulted through the pre-opening process.
Risk Management	Pre-opening and creation of the MAT	[REDACTED]. He will assist the Board in creating an assessment programme. When required a consultant from the Institute of Internal Auditors may be engaged to perform a review of processes. External auditors, on appointment, will provide an overview of financial controls.
Community experience	Pre-opening and creation of the MAT	We have already identified a Paediatrician with whom we are in discussion for this role. We are keen to involve other professional expertise and representation from the autism community.

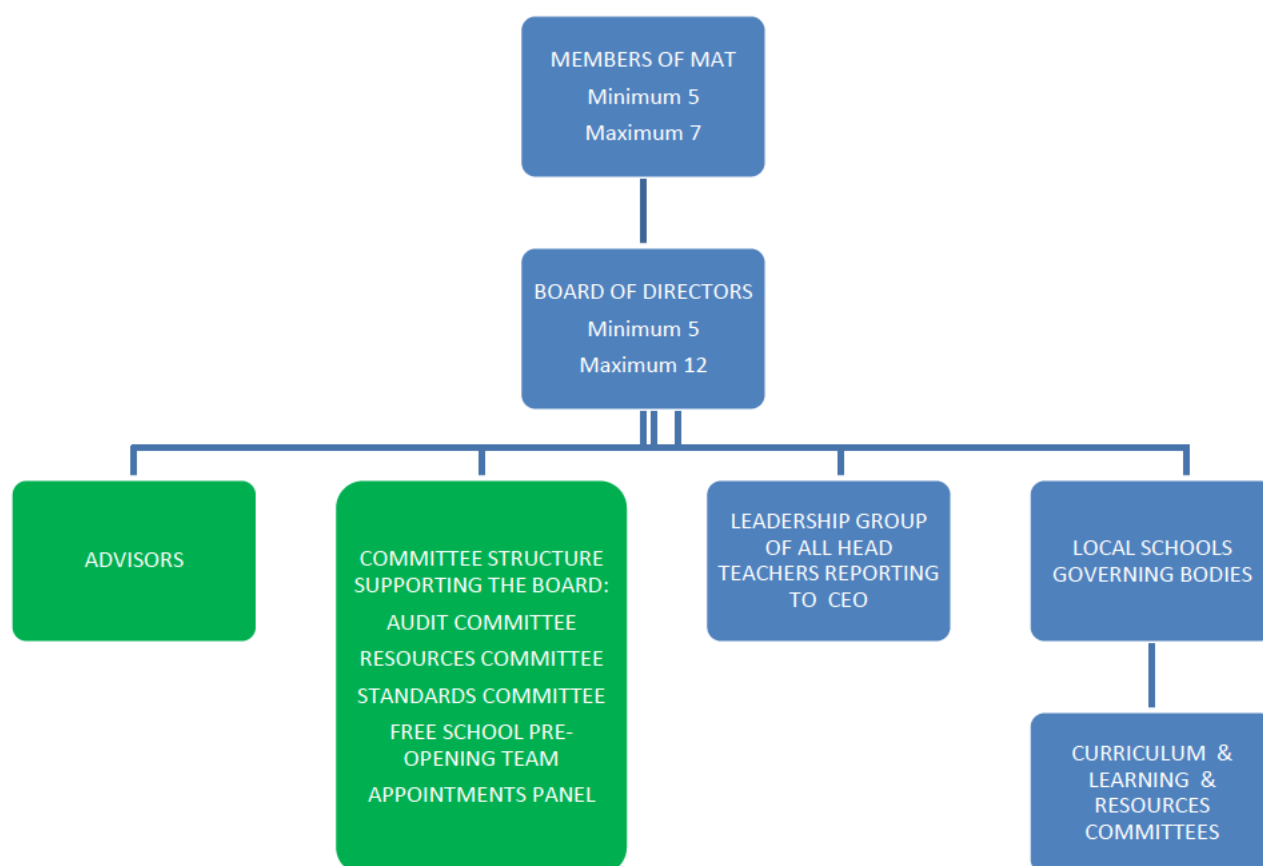
F2 – a governance structure, and roles and responsibilities that will ensure accountability and effective decision making in this academy trust and drive improvement in the new free school

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 [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

Fig F2.1 Governance Structure of MAT



Leadership Bodies

MAT structure: The MAT will be established April 2017 and Linden Hill School will open Sept 2018. The MAT is established with a minimum of 2 Special Schools with Outstanding ratings. There are at least 5 further SEN schools interested in joining the MAT. Their Headteachers and Governing Bodies have been closely involved in the MAT

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

planning and design process. The date of April 2017 for the formation of the MAT has been set to allow LGBs to agree the MAT vision, consult with stakeholders, appoint legal advisors, create the memorandum of understanding and scheme of delegation. There is a series of planned meetings with the pre-registration Board and Members and LGBs between September 2016 and July 2017, which will formalise the timetable.

Members of the Trust: The Members of the MAT will be around 5 with a minimum of 3 to be selected from the experienced current Governing Bodies, thereby providing extensive experience of the Specialist School Environment. All appointments will be based on selection following a knowledge, skills and experience audit. They will be individuals who have had senior executive roles in Commerce or Public Service who have had experience of organisations with sizeable annual budgets. In addition we will seek a candidate with Community Experience. The Chair of the Board of Directors will be a Member which will ensure a close link between the two Governance Groups. Employees of the Trust cannot be Members.

Members' responsibilities: Members will have overall legal responsibility for the establishment of the MAT. They will create and sign the Articles of Association and will have the power to subsequently amend the Articles of Association. They will appoint Directors/Trustee. They will hold annual meetings as a minimum. Otherwise they are constituted for approval of significant strategic change or to remove Directors/Trustee.

Directors/Trustee responsibilities: The Directors/Trustee will be responsible for the Vision and Aims of the Trust. They will appoint the CEO and conduct their performance management reviews. This body will set the Trust long term strategy, including growth and development of the MAT. They will consult with the LGB's and govern this relationship through the Scheme of Delegation. Key aspects are the strategic management of Finance, Safeguarding, Standards and Policies:

- To ensure quality of educational provision
- To challenge and monitor performance, setting the school improvement plan
- To manage finances and property
- To appoint Headteachers after consideration of recommendations by the Appointments panel
- To manage the Headteachers through the CEO. The CEO will be the Accounting Officer responsible for accounting to EFA/ DfE.
- To exercise reasonable skill and care in carrying out their duties
- To ensure compliance with charity and company law
- To ensure the schools' ethos promotes the fundamental British Values of democracy, the rule of law, individual liberty, and mutual respect and tolerance for those of different faiths and beliefs
- To ensure operation in accordance with Funding Agreement
- To be aware of financial, organisational and educational risk and to ensure it priorities its work to manage by exception
- The Directors/Trustee will also provide Reports to Members at the AGM on progress for the year and to present financial statements and annual report.
- The Directors/Trustee are, in legal terms, the governors of all the schools in a

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

MAT, even though they may delegate certain functions to LGBs. The responsibilities of LGBs will be contained in the Scheme of Delegation.

Committee structure: There will be 3 Core Committees of: Resources; Standards and Improvements; and Audit. These will be made up of Directors/Trustee with relevant skills but may well invite external Advisors and Local Governing Body representatives, Head Teacher, Staff and Parent representatives to inform their thinking and assist in preparation and review of reports and recommendations to the Board of Directors/Trustees provided non- Directors/Trustee are in the minority. These Committees will focus on the high level strategies and objectives of the MAT and setting Policies for the MAT. They will meet regularly. There will be no need for an Admissions Panel as Surrey County Council will continue to be the Admissions Body.

Committee responsibilities: The Resources Committee will be responsible for:

- Headteacher appraisal and recruitment, making recommendations to the Board of Directors
- the Funding Agreement
- overseeing the total budget of the MAT and approving each school's annual budget and capital expenditure budget
- setting the Pay Policy
- monitoring the schools financial performance and will intervene when a school maintains a deficit
- setting the Finance Policies and ensuring prudent management of funds and that expenditure is value for money
- recommending the budgets and capital expenditure to the Board of Directors/Trustees for approval

The Audit Committee will be responsible for:

- the selection of auditors
- overseeing risks in the organization
- organising internal audit reviews to ensure good financial controls are maintained
- recommending to the Board of Directors/Trustees the appointment of auditors and acceptance of the risk register

The Standards Committee will:

- ensure that a high quality of education is maintained
- monitor and challenge performance of the Local Governing Bodies and Headteachers
- provide quarterly summary reports to the Board of Directors/Trustees

CEO responsibilities: In addition there will be a Chief Executive who will be selected initially from one of the Headteachers from the initial schools in the MAT. This will ensure that there is experience of SEN Teaching as well as having good relationships with current Headteachers. As the MAT develops future CEOs will be recruited following a rigorous process including both internal and external candidates. The CEO will be the most senior employee responsible for all employed staff in the MAT. All Headteachers and Executive Headteachers will report to the CEO.

Local school structure: The local schools will continue to have Local Governing Bodies (LGB) and a Senior Leadership Team including a Headteacher/Head of School. LGB

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

responsibilities are:

The LGB will be guided by the Scheme of Delegation.

Headteacher leadership group: Headteachers and the CEO will meet regularly. They will co-produce the vision and values of the MAT with the Board and drive this into schools. They will work with the Standards Committee to establish standards, share school development and improvement plans. Through the Teaching School, they will devise the CPD and training for the development of all staff. A summary report will be prepared for the Board.

Centralised services: To maximise the benefits of the MAT there will be sharing of experience and ideas and centralisation of some functions to obtain value for money. This function will be developed as the MAT size increases. The MAT intends to provide a number of services centrally such as Finance, HR, IT, Premises, Procurement, Safeguarding, Capital projects and Audit etc. This will be governed through the Resources Committee but will be managed by the CEO. As the MAT develops and expands, centralised roles for an HR Manager, Finance Manager, Premises Manager and IT Manager may be created. The Finance Department will use the Academies Financial Handbook as its guide. Financial standards and propriety will be overseen by this Central Finance function. As the MAT develops the Premises structure will be revised. Those more experienced Premises managers may become a centralised function with more junior site caretakers. Procurement of Building Services and IT will be centralised. The building of Linden Hill will be overseen by the EFA and external commissioned professionals but will then come under the centralised function.

These services will be funded by a contribution from school budgets to the centre and this contribution will be negotiated between the centre, Headteachers and LGBs annually. Central services will be delivered to schools against individual service level agreements and performance against agreed KPIs will be reported to Headteachers and LGBs annually when the proposed central services charge will also be agreed. We expect to see some modest savings immediately in respect of such things as audit fees, external financial support etc. but over the following 2/3 years we expect larger savings to be achieved through more efficient procurement, back office efficiency savings, elimination of duplication etc.

Effective decision making: The Members shall be a minimum of 5. This will enable special resolutions to be decided by 75% while ordinary resolutions will just require a majority. The members will be supported by a Legal Adviser who will ensure proper Company Secretarial work is performed. The Members will hold an Annual General Meeting and will call special meetings when intervention is required when it is felt that the Board of Directors/Trustees is failing to meet its remit and to amend the Articles of Association. Whoever is elected Chair of the Board of Directors/Trustees will automatically become a Member. In the initial set-up phase of the MAT more frequent meetings will be organised.

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

Frequency	Reports	Decisions
Members:		
Annual Meetings	Annual Progress report for the MAT including proposed developments. Accounts Audit report Pension trustees report	Acceptance of Progress report Agreement of appointment of Directors. Approval of MAT progress and achievement. Acceptance of Annual Accounts. Acceptance of Audit report and recommendations Acceptance of Director/Trustee report and recommendations
Special Meetings		Amendment of Articles of Association. Removal/appointment of Directors/Trustees.

The Board of Directors/Trustees shall not exceed 12. When they require specific expertise they will engage advisers. They will maintain a strategic overview through the LGB by receiving regular monitoring reports including KPI's. They will pass certain responsibilities to LGB through a 'Scheme of Delegation'. They will appoint Headteachers and CEO following recommendations from the appointments committee supported by specialist advisers and representatives from the LGB. They will intervene in the local management if they believe the progress, outcomes, safeguarding or financial security is unsatisfactory or a cause of concern.

Frequency	Reports	Decisions
Board of Directors		
Annual Meetings	Annual Accounts and Auditors report. Annual and three year rolling development plan and budget Premises spending programme Pay review/staff	Review of the Financial position and plan for implementation of recommendations from Auditors To accept the budget, determine actions to remediate any deficit or surplus positions. Ensure the school development plan is fully funded Acceptance of Revenue to Capital transfers to fund approved capital projects Setting annual pay increments, funding

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

	<p>performance</p> <p>Scheme of Delegation</p> <p>Annual Headteachers and LGB reports</p> <p>Staff survey</p> <p>Safeguarding</p> <p>Community outreach</p> <p>Financial governance controls</p>	<p>of Pensions, performance bonuses. Accepting proposed staff numbers and grades. Performing Head teacher appraisals</p> <p>Review and acceptance of any changes to authorities</p> <p>Acceptance of progress reports and approval of recommendations</p> <p>To ensure that the welfare of staff</p> <p>To ensure that safeguarding policy and practices are rigorously followed</p> <p>To review involvement in Local Community events</p> <p>Annual evaluation of the adequacy of Financial Controls</p>	
Termly Meetings	Progress reports	Review progress on annual improvement plans from Headteachers and LGB. These reports will cover broad summaries for the MAT on health and safety, staff reports and pupil progress and attendance. Directors/Trustees will review need for any remedial action and if additional spending is required. They will intervene when they are concerned about progress.	
	Committees reports	Consider recommendations from Committees including requests for staff requirements and expenditure requests.	
	Budget against actual	To ensure that the financial position of the MAT is in line with budget and to ensure any major variances have been properly approved or remediated.	
	Capital spend requests	Approve/reject requests on major spends.	

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

Local Governing Body (LGB):

Annual Meetings	Pay review/staff performance	Approving annual pay increment and performance related pay and staff complement against pay policy and budgets.
	Teaching and learning report and pupil progress report.	Provide summary of KPI's and pupil progress. Recommend curriculum and pupil performance targets for the following year.
Termly Meetings	Progress reports	Review progress on annual improvement plans
	Health and Safety	To ensure health and safety standards are maintained. To review any instances and ensuring remedial actions are taken and are sufficiently funded.
	Staff reports	To ensure attendance, health and sickness and training are at acceptable levels.
	Pupil attendance	To ensure there school is fully attended and pupil places are occupied.
	Budget against actual	To ensure that the financial position is in line with budget and to ensure any major variances have been properly approved or remediated. Account for major variances and material or sustained deficits to Board of Directors/Trustees.
	Capital spend requests	Submit major requests to Board of Directors.

Effective challenge:

At both Director/Trustee and LGB level they must provide effective challenge to the Head Teacher and senior leadership teams. A strategic plan will be produced for one and three years. It is progress against this plan that the schools leadership teams will be assessed on an annual and termly basis. The Governors will act as critical friends challenging proposals to test that they will deliver the expected outcomes and ensuring good financial propriety. Progress will be measured against pre-set milestones. In the event of

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

sustained under-performance action would be taken that may involve removal and replacement of key staff members and control may devolve to a higher authority for a temporary period. There will be termly meetings of all bodies as a minimum at which the above reports will be analysed and appropriately challenged. Progress will also be assessed against appropriate external comparative data. Directors/Trustees and Governors will have a regular structure of visits to the schools on which they will provide reports on a central portal. Governors will also attend parent forums and be visible at key school events. The MAT will follow the guidance of the New Governor Handbook 2016, The Academies Financial handbook and be a member of the NGA. Directors/Trustees and Governors will attend County and National Governor Forums and networks to gain insight and to benchmark. They will also attend regular training and keep informed through press and specialist publications. Through these measures Directors/Trustees and Governors will be able to effectively challenge and inspire the School Leadership teams. Regular skills audits will identify any skill gaps. This will inform the recruitment of new Governors. The MAT will seek to recruit experienced individuals from a broad range of areas, education, commerce, local community, medical, faith groups and charitable backgrounds. This breadth will bring diversity to the challenge to the leadership team. Parent and staff governors will bring perspectives that ensure that the leadership is mindful of these two key perspectives. The Directors/Trustees and Governors must have the time and passion to be dedicated to the success of the school. Section F1 and F2 discusses current governor qualities and any identified skill gaps.

Conflicts of Interest

It is essential that the decision-making is not biased. To ensure that all Directors/Trustees and Governors are making decisions free from bias there will be annual lists of Interests maintained. In addition at any meeting there will be a declaration of interests recorded. In some cases this may mean that the Director/Trustee/Governor may have to step down from a specific decision. These requirements will be included in the Articles of Association.

In the event of a Director/Trustee/Governor providing a paid service to the MAT, three competitive quotes must be obtained. The Director/Trustee/Governor may only provide the service on a cost basis in compliance with the Academies Financial handbook. Service delivery will be independently scrutinised by the Finance Director to ensure the service provides value for money. Where parents provide a service similarly there will be the same scrutiny. Any financial transactions with Directors/Trustees, Governors or parents will be publically disclosed on the MAT website.

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

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

[Add text here. Table expands]

F4 – Independent schools, including special institutions that are privately run only: 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, including alternative provision institutions that are privately run only: a good financial track record and credible plans for meeting the standards of the state sector

[Add text here. Table expands]

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

[Add text here. Table expands]

Section G – accurate financial plans that are consistent with the rest of the application, demonstrate financial viability, and are based on realistic assumptions about income and expenditure

All applicants will need to complete this section but you will give us less 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, just particular areas you want to highlight); 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.

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

Section H – premises (use Excel spread sheet)

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

- complete the Section H tab in the Excel spread sheet; and
- refer to the [*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, any letters of support and maps.
- The annex is excluded from the page limit but should be submitted as part of your application, i.e. as one Word document.
- 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.

CV template

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

CV template		
	<p>qualifications</p> <ul style="list-style-type: none"> • If these results are not available, set out the track record of your school in terms of developing literacy and numeracy skills, qualifications achieved and preparing pupils for later life 	
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 • If these results are not available, set out the track record of your subject/department/school in terms of developing literacy and numeracy skills (where appropriate to your subject and department), qualifications achieved and preparing pupils for later life 	
6	Brief comments on why your	

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

Self-assessment form for independent schools

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

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

	<p>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>		
<p>Behaviour and safety of pupils</p>	<p>[Please refer to the Ofsted handbook and supplementary handbooks e.g. Keeping Children Safe in education for further guidance. 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. Data on key areas such as attendance (grouped data), persistence absence, exclusions compared to national data sets Student questionnaires and reviews as evidence to support outcome</p>		

	<p>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>		
<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>		
<p>The extent to which the</p>	<p>[pupil recruitment and how the education will be adapted to meet the</p>		

<p>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>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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