



## Notes of Meeting: South West

22 May 2023

AB members who sent their apologies for the meeting have, where possible, been consulted on all projects before the meeting. Their views are reflected in the discussion at the meeting (where appropriate). This excludes items where that member declared a conflict of interest.

### Regional Director (RD) chair

- Hannah Woodhouse

### Advisory Board (AB) members

- Mark Ducker
- Jennifer Blunden
- Margaret Simmons-Bird
- Adele Haysom
- Steve Savory
- Jackie Smith
- Ben Antell
- Rachel Howie

### Guests

- None

### Apologies

- None

### DfE senior civil servants

- Lucy Livings
- Matthew Stevenson

### Representations received

- Two representations were received and considered for Widden Primary School, **Gloucestershire** joining Greenshaw Learning Trust (GLT).

# General Discussion Points

## Regional Director Update

- AB members shared local intelligence and provided insight on the challenges being faced by the sector.
- Ofsted inspection outcomes from the start of this academic year were shared after the meeting.

## Converter Academy Orders

Points discussed in relation to school conversion.

**Project:** To discuss Wolborough Church of England (Aided) Nursery and Primary School, **Devon** converting to academy status and joining Link Academy Trust.

**AB Discussion:** The board members considered the case and did not raise any concerns with the proposal.

**RD decision:** Approve.

Conflicts: None

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Trinity Church of England Voluntary Aided Primary and Nursery School, **Devon** converting to academy status and joining The Academies for Character and Excellence (ACE).

**Points raised in discussion:**

**Strategy:**

- The school has voluntarily applied to join ACE, an established and growing MAT of eight primary schools in Devon and Torbay with a presence in Exeter.
- The school was judged as requires improvement in March 2022, ACE have an innovative approach to teaching and learning and a proven track record with primary schools. After consultation and due diligence Trinity agreed that ACE is the right MAT to join.
- The approach of ACE, promoting a character-based curriculum, aligns well with the school's vision, values, and religious ethos.

**School Improvement:**

- The Trust has established a strong culture of SI, with a focus on excellence and disadvantage outcomes.
- Trinity has agreed a management partnership with ACE for the provision of school improvement support and a collaborative working partnership is already established.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss the following two schools converting to academy status and joining TEAM Multi-Academy Trust:

- Pilton Infants' School, **Devon**
- Horwood and Newton Tracey Community Primary School, **Devon**

**AB Discussion:** The board members considered the case and did not raise any concerns with the proposal.

**RD decision:** Approve.

**Conflicts:** None

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss the following two schools converting to academy status and joining Ventrus Limited:

- St George's Church of England (VA) Infant and Nursery School, **Devon**
- St Margaret's Church of England (Aided) Junior School, **Devon**

**Points raised in discussion:**

**Strategy:**

St George's CoE VA Nursery and Infants School and St Margaret's CoE Junior School (part of Northam Federation) have voluntarily applied to join the Ventrus MAT. Ventrus are a trust of 15 primary and 1 secondary school located in Exeter and North Devon. **Governance:**

- The structure of the Trust Board and Members was commented on, and the overlap of governance tiers across trustees, members, and local governing bodies and the need to strengthen its education expertise. This will be raised with the trust and their plans to mitigate this through future recruitment.

**School Improvement:**

- The schools have benefitted from regular networking sessions with primary schools within the trust that has already provided improvement in curriculum, teaching and learning with access to school improvement advisors. It was noted that the CEO is the School Improvement lead and should there be a more structured model with the size of the trust (taking to 18 schools). This will be raised by Regions Group and to consider recruiting a Director of Education.

**Finance:**

- Pupil forecasts suggest that both schools will be under capacity in the next 3 years. Governors are in discussion with the Local Authority and the option of an SRMA visit has been discussed.

**Other:**

- Both schools are currently in a Management Partnership with Ventrus and improvements are already being seen at the school by the Diocese. The Diocese provisionally supports the decision.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Mary Dean's CofE Primary School, **Plymouth** converting to academy status and joining The First Federation Trust.

**AB Discussion:** \*\*

**RD decision:** Approve.

**Conflicts:** Steve Savory was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project was discussed together with Charmouth Primary School, **Dorset** joining The First Federation Trust.

**Project:** To discuss St Louis Catholic Primary School, Frome, **Somerset** converting to academy status and joining The Dunstan Catholic Educational Trust.

**AB Discussion:** \*\*

**RD decision:** Approve.

**Conflicts:** None

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project was discussed together with Saint Edmund's Catholic Academy (SAT), **Wiltshire** transferring to The Dunstan Catholic Educational Trust.

**Project:** To discuss the following four schools converting to academy status and joining Quantock Education Trust (QET).

- Ashlands Church of England Primary School, **Somerset**
- Haselbury Plucknett Church of England First School, **Somerset**
- Merriott Primary School, **Somerset**
- St Bartholomew's Church of England Primary School, **Somerset**

**AB discussion:**

**Strategy:**

- The four schools are part of Crewkerne and Ilminster Schools Partnership (CISP), they have voluntarily applied to join Quantock Education Trust (QET). It makes sense for all four schools to move together into the same MAT, they are close to each other and have established good working relationships, Haselbury Plucknett and Merriott are federated and share a headteacher.
- The schools will benefit from economies of scale and centralisation of services, and from the support structure of a MAT as they transition from first to primary schools.
- QET is building a good track record of effective school improvement (SI) and already has good working relationships with all four schools.

## **Governance:**

- The diversity of the Trust Board and the need to strengthen its primary education expertise was discussed. This will be raised with the Trust along with their plans to mitigate through future recruitment.
- The schools' current governing bodies will become local governing committees (LGCs) on joining QET. A QET trustee will attend each LGC meeting to support the transition to the new governance approach under the QET Scheme of Delegation.
- Refer to conditions.

## **School Improvement:**

- The trust does not yet have a full in-house SI support team and they are aware of the need to recruit and develop greater internal SI capacity.
- The trust is in the process of recruiting a primary SI lead and considers the addition of these four schools will enable further development of its in-house capacity.
- The CEO currently has oversight of SI, and it was discussed by AB members that as the trust expands this may not be sustainable.
- Refer to conditions.

## **Finance:**

- Condition issues have been identified at each of the schools. The schools and trust are anticipating that the LA will fund and to have completed work on some of the highest priority elements before conversion. The trust also plans to submit Condition Improvement Fund (CIF) bids to fund the most pressing works.
- Regions Group will continue to work closely with SFSO and the trust to secure assurances that any financial risk to the trust due to capital works is at an acceptable level.
- Refer to conditions.

## **Other:**

- While the schools are not located close to QET's head office, they form a cluster in the Crewkerne area. The existing working relationships with this group indicate that distance is not a significant factor.

**RD decision:** Approve with conditions.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

## **Sponsored Route:**

Points discussed in relation to a school's sponsor status.

**Project:** To discuss Heathfield Community School, **Somerset**, converting to academy status and joining Cabot Learning Federation (CLF).

**AB discussion:**

**Strategy:**

- Heathfield Community School has been governed by an Interim Executive Board (IEB) from summer 2022 and has employed an interim Headteacher from Cabot Learning Federation (CLF) to provide leadership capacity following concerns about the quality of provision at the school.
- The IEB voted for the school to join CLF (February 2023), they felt the school would benefit from the Trust's extensive educational expertise, specialist resources and the opportunities for the school to learn and share best practice as part of a strong family of schools.
- The Ofsted inadequate judgement (March 2023) superseded the voluntary conversion, and the report emphasised the need for Heathfield to be part of a strong family of schools, which CLF can deliver.
- The key benefits of joining CLF were discussed - continued strengthening and embedding of leadership, rapid improvements against safeguarding and behaviour concerns, clarity of SI approach and enhanced support for school staff, and improved outcomes for all learners.

#### **Governance:**

- It was commented on the need to ensure that support is provided to the Headteacher, and the Regions Group will discuss this with the Trust.

#### **Finance:**

- The school estate requires capital work, the Regions Group team and the ESFA will continue to work closely with the Trust on the funding for these critical works.

#### **Other:**

- The recent Ofsted judgement reflected the long-term challenges of the school. . It was acknowledged that CLF had been limited in the scope of the actions that they could progress prior to the school joining the trust and improvements now need to be delivered at pace.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Widden Primary School, **Gloucestershire** converting to academy status and joining Greenshaw Learning Trust (GLT).

#### **AB discussion:**

The two representations received were acknowledged.

#### **Strategy:**

- Widden Primary School supports a diverse school community with over 70 languages spoken in the local community.
- GLT has an established strong track record of improving schools, both primary and secondary, Widden is the first primary school in Gloucestershire to join this trust and is a good strategic fit.

#### **Other:**

- The Trust is mindful that the school has had an unsettled few years and GLT will engage with the staff and local community early to provide direction and reassurance of the support that the trust can offer.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Charmouth Primary School, **Dorset** converting to academy status and joining The First Federation Trust.

**AB discussion:** The board members considered the case and did not raise any concerns with the proposal.

**Other:**

- Both schools have established strong working partnerships with the Trust.

**RD decision:** Approve.

**Conflicts:** Steve Savory was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project discussion includes Mary Dean's CofE Primary School, **Plymouth** converting to academy status and joining The First Federation Trust.

## Trust Change

Points discussed in relation to academies moving to another trust.

**Project:** To discuss the following four academies, **Bristol** (Learn@ MAT) transferring to Midsomer Norton Schools Partnership.

- Soundwell Academy, **Bristol**
- Notton House Academy, **Bristol**
- Knowle DGE Academy, **Bristol**
- St Matthias Academy, **Bristol**

**AB discussion:** \*\*

**Strategy:**

- The interim leadership and current Learn@ MAT board have advised that the trust cannot continue to operate, and the current arrangements should not continue beyond September 2023.
- Cabot Learning Federation (CLF) is the proposed sponsor for Lansdown Park Academy and Brook Academy, following these transfers the trust identified MNSP as is preferred merger partner for the remaining four academies.

- MNSP has a strong track record of improving schools at pace and achieving excellent outcomes for its pupils. It has the capacity to take on the scale of challenge of the RI schools and incorporate Learn@'s central services.

### **Governance:**

- The diversity of the MNSP Trust Board and the need to strengthen its education expertise was discussed. It was acknowledged the challenge of SEN and AP schools and the need to have a trust board that can hold senior leaders to account. This will be raised with MNSP and their plans to mitigate this through future recruitment.

### **School Improvement:**

- MNSP does not yet have a track record of improvement in AP schools and their capacity and experience to deliver was discussed, the trust has a member of staff seconded to Learn@ currently who has been a stabilising influence.
- MNSP operates a single Special School which leads the trust's SEND outreach team to support mainstream schools to meet the needs of pupils with SEND. The trust runs a local SENCO network, that aims to improve the knowledge of staff and share best practice.
- MNSP has expanded capacity ahead of this growth and appointed a lead with experience of specialist provision for the trust's specialist school hub. Regions Group will continue to work closely with the senior leadership of MNSP on the growth strategy and their plans for the longer term.

### **Finance**

- MNSP and Learn@ have been working closely over the last few months to identify liabilities and gain a better understanding of the funding for each school and are in a strong position to resolve any findings ahead of the transfer.

### **Other:**

- CLF has supported the improvement of safeguarding practice at Brook Academy by conducting safeguarding and health and safety audits.
- The Ofsted report for Lansdown Park highlighted the weaknesses in the curriculum and will be a focus for CLF, support will be drawn from their expanded specialist hub. They plan to retain the leadership team.

**RD decision:** Approve.

**Conflicts:** Margaret Simmons-Bird was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project discussion includes Lansdown Park Academy, **Bristol** (Learn@ MAT) transferring to Cabot Learning Federation

\*\* This project discussion includes Brook Academy, **Gloucestershire** (Learn@ MAT) transferring to Cabot Learning Federation.



**Project:** To discuss Lansdown Park Academy, **Bristol** (Learn@ MAT) transferring to Cabot Learning Federation.

**AB discussion:** \*\*

**RD decision:** Approve.

**Conflicts:** Margaret Simmons-Bird was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project was discussed together with the four academies, **Bristol** (Learn@ MAT) transferring to Midsomer Norton Schools Partnership

\*\* This project was discussed together with Brook Academy, **Gloucestershire** (Learn@ MAT) transferring to Cabot Learning Federation.

**Project:** To discuss Brook Academy, **Gloucestershire** (Learn@ MAT) transferring to Cabot Learning Federation.

**AB discussion:** \*\*

**RD decision:** Approve.

**Conflicts:** Margaret Simmons-Bird was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project was discussed together with the four academies, **Bristol** (Learn@ MAT) transferring to Midsomer Norton Schools Partnership

\*\* This project was discussed together with Lansdown Park Academy, **Bristol** (Learn@ MAT) transferring to Cabot Learning Federation.

**Project:** To discuss Sparkwell All Saints Primary School (SAT), **Devon** transferring to Link Academy Trust.

**AB discussion:** The board members considered the case and did not raise any concerns with the proposal.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Highworth Warneford School (SAT), **Swindon** transferring to The Park Academies Trust (TPAT)

**Points raised in discussion:**

### **Strategy:**

- Highworth Warneford School (HWS) has voluntarily applied to transfer into TPAT, an established and growing MAT of 3 primary and 2 secondary schools in Swindon.
- HWS has received two successive RI Ofsted judgements and have acknowledged the need to join a strong MAT that can support the delivery of the required improvements at pace.

### **Governance:**

- The diversity of the Trust Board and the need to strengthen its education expertise at primary was discussed. This will be raised with the Trust and their plans to mitigate this through future recruitment.

### **School Improvement:**

- TPAT are already providing support to HWS through the Trust and School Improvement (TSI) offer and have a good understanding of the improvements needed.
- The Trust delivers school improvement services through their CEO, executive leaders, and professional external mentoring however they do not currently have a dedicated School Improvement lead, this has been factored into their future growth and will be subject to regular updates with the trust and the Regions Group team.

### **Finance:**

- HWS has a falling roll, TPAT have advised that they can support the financial implication whilst working to increase pupil numbers.

**RD decision:** Approve.

**Conflicts:** Adele Haysom was not present and did not receive the papers for this project.

**Further actions required:** Delivery officer to inform the schools and trust.

**Project:** To discuss Saint Edmund's Catholic Academy (SAT), Wiltshire transferring to The Dunstan Catholic Educational Trust (DCET).

**AB discussion:** \*\*

### **Strategy:**

- This is an opportunity for the schools to join a Catholic majority articles Trust, that meets the Catholic requirements and the Bishop's directive.
- The schools are near each other and to other schools within the Trust.
- Both schools are collaborating with DCET.

### **Governance:**

- The schools will bring capacity to DCET with a strong and experienced leadership team, St Louis has two middle leaders who provide support to Local Authority schools and MATs in the area.

- AB members asked about the support that is in place for the CEO with a growing Trust and future growth will be discussed with the Trust and the Regions Group team.

#### **School Improvement:**

- The schools will benefit from increased access to school improvement support (SI), central team support, and school-to-school support.
- There is evidence of the effectiveness of DCET's school improvement approach, they have made recent appointments to their SI team and have robust plans in place which will be subject to regular review with the Regions Group team.

#### **Finance:**

- The schools joining DCET will have a positive impact on the school's sustainability.

#### **Other:**

- The recent and future growth of the Trust was discussed, and this will be regularly reviewed with the Regions Group team.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

\*\* This project discussion includes St Louis Catholic Primary School, Frome, **Somerset** converting to academy status and joining The Dunstan Catholic Educational Trust.

## **Significant Change**

Points discussed in relation to significant change.

**Project:** To discuss a significant change application for Three Ways School (SAT), **Bath and North East Somerset** to increase capacity from 220 to 240 places.

**AB discussion:** The board members considered the case and did not raise any concerns with the proposal.

**RD decision:** Approve.

**Further actions required:** Delivery officer to inform the schools and trust.

## **Academy Opening Approved in Principle**

List of academies approved to open.

*All of the projects have gone through previous Advisory Board meetings for consideration and discussion. These projects are checked for any legal inconsistencies to ensure they are in line with departmental requirements and that all conditions are met.*

**Project:** Amberley Parochial School, **Gloucestershire** (The Diocese of Gloucester Academies Trust)

**AB in discussion:** No questions or concerns were raised.

Opening date 1 June 2023.

**Conflicts:** None.

**Further actions required:** No action required.

**Project:** Oakhurst Community Primary School, Swindon (Grove Learning Trust)

**AB in discussion:** No questions or concerns were raised.

Opening date 1 June 2023.

**Conflicts:** None.

**Further actions required:** No action required.

**Project:** St Mary's Church of England VA Primary School, **Gloucestershire** (The Diocese of Gloucester Academies Trust).

**AB discussion:** No questions or concerns were raised.

Opening date 1 June 2023.

**Conflicts:** None.

**Further actions required:** No action required.

**Project:** Sturminster Newton High School, **Dorset** (Sherborne Area Schools' Trust).

**AB discussion:** No questions or concerns were raised.

Opening date 1 June 2023.

**Conflicts:** None.

## Decisions taken between AB meetings

List of decisions taken by the RD outside of AB meetings.

**Project:** To discuss a retrospective significant change application for Berkeley Primary School, **Gloucestershire** (Special Partnership Trust) to change the age range from 4 – 11 to 2 -11 to incorporate nursery provision.

**Decision type:** Significant Change.

**RD decision:** Approve.

**Conflicts:** None.

**Further actions required:** Delivery officer to inform the schools and trust.

## **List of projects listed on the published draft agenda, but were removed before the meeting**

List of projects that were on the published draft agenda but not discussed at the AB meeting.

None

© Crown copyright 2023