



Notes of Meeting: Yorkshire and Humber Advisory Board

04 July 2023

Attendance

Attendance data is published annually on the GOV.UK website.

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

- Alison Wilson

Advisory Board (AB) members

- Carol Dewhurst OBE
- Rowena Underwood
- Jonny Uttley
- Kash Rafiq
- Andy Child MBE

Guests

- None

Apologies

- Tom Banham
- Jenn Plews
- Mark Wilson

DfE senior civil servants

- Charlotte Marr (Deputy Director)
- Matthew Edwards (Deputy Director)

Representations received

- 17 emails received; consider Whitehill Academy, Halifax, (I-trust - to dissolve trust) joining Trinity Multi Academy Trust, (Trust Change).
- 1 email received; Heckmondwike Primary School, Batley, to convert and join Delta Academies Trust, (Sponsored Route).

Converter Academy Orders

Points discussed in relation to school conversion.

Project: To discuss Berry Brow Infant and Nursery School, Huddersfield, to convert and join Impact Education Multi Academy Trust.

AB Discussion:

- Berry Brow Infant and Nursey School and Newsome Junior School have chosen to voluntarily convert to become academies and join Impact Education MAT, with a proposal for both schools to convert simultaneously. The schools are informally federated, sharing the same Governing Body and Headteacher, with the Headteacher splitting their time between both schools. Berry Brow is a feeder school for Newsome Junior School.
- Although Berry Brow was judged to be Good at its last section 5 inspection in 2016, the most recent section 8 inspection (2022) indicates the school may not maintain this good judgement. The school recognises there are improvements to be made and welcomes the support of an established MAT. The school has therefore sought to identify and join a MAT that can provide support, advice and guidance to their school improvement journey.
- It was noted that the Trust is currently in a deficit financial position. Schools Financial Support and Oversight (SFSO) colleagues recommended that prior to conversion, the Trust must agree to a viable recovery plan. To facilitate this, the trustees must meet monthly and provide monthly Management Accounts to the Department. A School Resource Management Advisor (SRMA) has been deployed to the Trust.
- The performance of the Trust's existing primary schools was discussed. Whilst it was noted that some of the schools were below national average, it was considered that sufficient progress was being made.
- AB members were supportive of the project, subject to the financial recovery plan.

RD decision: Approve with conditions

Conflicts: Kash Rafiq was not present and did not receive papers for this item.

Further actions required:

- SFSO to agree viable recovery plan to conversion. To aid this, the trust must provide monthly management accounts to track recovery and hold monthly finance meetings to facilitate / evidence the above.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Newsome Junior School, Huddersfield, to convert and join Impact Education Multi Academy Trust.

AB Discussion:

- Berry Brow Infant and Nursey School and Newsome Junior School have chosen to voluntarily convert to become academies and join Impact Education MAT, with a proposal for both schools to convert simultaneously. The schools are informally federated, sharing the same Governing Body and Headteacher, with the Headteacher splitting their time between both schools. Berry Brow is a feeder school for Newsome Junior School.
- The school was judged Requires Improvement at its last full inspection in 2019 and has had two monitoring visits since (March 2021 - virtual; July 2021). The most recent of these indicating that 'leaders and those responsible for governance are taking effective action in order for the school to become a good school'. Overall, this indicates an upward trajectory, but the school acknowledges there is work to do to secure a firm 'Good' judgement or above at their next inspection. As such, they have sought to find a trust that can provide support, advice and guidance on their journey to Good.
- It was noted that the Trust is in a deficit financial position currently. SFSO colleagues recommended that prior to conversion, the Trust must agree to a viable recovery plan. To facilitate this, the trustees must meet monthly and provide monthly Management Accounts to the Department. A School Resource Management Advisor (SRMA) has been deployed to the Trust.
- The performance of the Trust's existing primary schools was discussed. Whilst it was noted that some of the schools were below national average, it was considered that sufficient progress was being made.
- AB members were supportive of the project, subject to the financial recovery plan.

RD decision: Approve with conditions

Conflicts: Kash Rafiq was not present and did not receive papers for this item.

Further actions required:

- SFSO to agree viable recovery plan to conversion. To aid this, the trust must provide monthly management accounts to track recovery and hold monthly finance meetings to facilitate / evidence the above.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Heptonstall Junior Infant and Nursery School, Calderdale, to convert and join The Family of Learning Trust

AB Discussion:

- This item was first discussed at the Yorkshire and Humber Advisory Board in June 2023 alongside the proposal for Shirley Manor Primary School (Shirley Manor Academy) joining The Family of Learning Trust. It was brought back to the July 2023 Advisory Board as the issues raised in June have now been addressed.
- The Delivery Officer confirmed that the Trust School Improvement Lead would provide leadership support to the school, having previously led the Trust's Dean Field school from an Inadequate Ofsted judgement to Good in 2022. Board members recommended that the Trust engage with CEO and CFO mentoring with experienced leaders.
- A revised budget for the school has been provided to SFSO colleagues. The Board considered the Trust's financial forecasts in light of current pressures on budgets and a School Resource Management Advisor (SRMA) was recommended.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- SRMA to be deployed to the Trust.
- Trust to engage with CEO and CFO mentoring.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Barwick-in-Elmet Church of England Voluntary Controlled Primary School, Leeds to convert and join Leeds Diocesan Learning Trust (LDLT)

AB Discussion:

- This item was considered and deferred at the Yorkshire and Humber Advisory Board in March 2023. It is now being brought back to the Advisory Board for further consideration.
- It was confirmed that the CFO will be employed full time from September 2023. The Board members recommended that recruitment of the CEO and identification of SI Lead should commence immediately.
- SFSO colleagues outlined that due to the work which has been undertaken, they are now more assured about the financial situation.
- Board members were overall supportive of the project but would like to see a complete school improvement strategy before further growth.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Trust to immediately commence recruitment of CEO and identify a School Improvement Lead.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Roundhay St John's Church of England Primary School, Leeds to convert and join Leeds Diocesan Learning Trust (LDLT)

AB Discussion:

- This item was considered and deferred at the Yorkshire and Humber Advisory Board in March 2023. It is now being brought back to the Advisory Board for further consideration.
- It was confirmed that the CFO will be employed full time from September 2023. The Board members recommended that recruitment of the CEO and identification of SI Lead should commence immediately.
- SFSO colleagues outlined that due to the work which has been undertaken, they are now more assured about the financial situation.
- Board members were overall supportive of the project but would like to see a complete school improvement strategy before further growth.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Trust to immediately commence recruitment of CEO and identify a School Improvement Lead.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss St Matthew's Church of England (Voluntary Aided) Primary School, Bradford to convert and join Leeds Diocesan Learning Trust (LDLT)

AB Discussion:

- This item was considered and deferred at the Yorkshire and Humber Advisory Board in March 2023. It is now being brought back to the Advisory Board for further consideration.
- It was confirmed that the CFO will be employed full time from September 2023. The Board members recommended that recruitment of the CEO and identification of SI Lead should commence immediately.
- SFSSO colleagues outlined that due to the work which has been undertaken, they are now more assured about the financial situation.
- Board members were overall supportive of the project but would like to see a complete school improvement strategy before further growth.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Trust to immediately commence recruitment of CEO and identify a School Improvement Lead.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss North Stainley Church of England Primary School, North Yorkshire, to convert and join Leeds Diocesan Learning Trust (LDLT)

AB Discussion

- This item was considered and deferred at the Yorkshire and Humber Advisory Board in March 2023. It is now being brought back to the Advisory Board for further consideration.
- It was confirmed that the CFO will be employed full time from September 2023. The Board members recommended that recruitment of the CEO and identification of SI Lead should commence immediately.
- SFSO colleagues outlined that due to the work which has been undertaken, they are now more assured about the financial situation.
- Board members were overall supportive of the project but would like to see a complete school improvement strategy before further growth.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Trust to immediately commence recruitment of CEO and identify a School Improvement Lead.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Christ Church Church of England Voluntary Controlled Primary School, North Yorkshire, to convert and join Leeds Diocesan Learning Trust (LDLT)

AB Discussion

- This item was considered and deferred at the Yorkshire and Humber Advisory Board in March 2023. It is now being brought back to the Advisory Board for further consideration.
- It was confirmed that the CFO will be employed full time from September 2023. The Board members recommended that recruitment of the CEO and identification of SI Lead should commence immediately.
- SFSO colleagues outlined that due to the work which has been undertaken, they are now more assured about the financial situation.
- Board members were overall supportive of the project but would like to see a complete school improvement strategy before further growth.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Trust to immediately commence recruitment of CEO and identify a School Improvement Lead.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss The Hub School, Hull, to convert and join The Education Alliance

AB Discussion:

- The Hub School is a school which offers specialist support for pupils with SEMH needs. The school aims to improve the life chances of pupils for whom mainstream education has not been successful. Pupils attending the school are provided with an alternative education experience in a nurturing, safe and supportive environment.
- The school is at full capacity with 147 pupils and a further 20 pupils in short term PRU provision at the school's Welton site, which is a temporary arrangement. The Board recognised the need for early succession plans for the children currently using the Welton site.
- The Trust plans to get specialist experience through their strong strategic partnership with Wellspring Academy Trust. The Education Alliance is considered to be a good fit geographically and has the required resources to support the school.

RD decision: Approve

Conflicts: Jonny Uttley was not present and did not receive papers for this item.

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss Parson Cross Church of England Junior School, Sheffield, to convert and join James Montgomery Academy Trust.

AB Discussion:

- This item was considered alongside that of Bramley Sunnyside Junior School joining the same trust.
- Parson Cross CofE Primary School (PC) is seeking approval to convert to academy status and join The James Montgomery Academies Trust (JMAT). PC is a Church of England Voluntary Aided Primary School in the Diocese of Sheffield.
- The Diocese is supportive of the project and of JMAT moving into Sheffield Local Authority area. The school believes they would benefit from joining a Trust of JMAT's size and capacity.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss Bramley Sunnyside Junior School, Rotherham, to convert and join James Montgomery Academy Trust.

AB Discussion:

- This item was considered alongside that of Parson Cross Church of England Primary School joining the same trust.
- Bramley Sunnyside (BS) Junior School is a local authority maintained primary school in Rotherham, providing education for children aged 7 to 11 years. After conducting due diligence, BS established a working relationship with JMAT in November 2022.
- The school believes they would benefit from joining a Trust of JMAT's size and capacity.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Sponsored Route

Points discussed in relation to the Sponsored Route

Project: To discuss Little London Primary School, Leeds, to convert and join The GORSE Academies Trust.

AB Discussion:

- Little London Primary School is a 4-11 community school located in Woodhouse, Leeds. The Board recognised that this was a school in need of both school improvement and financial support.
- There is an existing relationship which would be strengthened through this conversion. It was considered that The GORSE Academies Trust (TGAT) has sufficient capacity and expertise to provide the support the school requires.
- The Board noted that the percentage of pupils with Education and Health Care Plans was below the National Average but was assured that this was due to the approach taken in assessing needs by Leeds Local Authority. It was also noted that the percentage of pupils entering the English Baccalaureate was below National Average.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss Northfield Primary School, Pontefract, to convert and join Pontefract Academy Trust.

AB Discussion:

- Northfield Primary School is a maintained primary school in the South Kirkby district of Wakefield.
- Board members noted that the school needs support to improve its pupils' performance at Key Stage 2, and this was a particular strength of the Trust.
- Projected pupil numbers were discussed, and the Delivery Officer confirmed that there are no concerns over the long term viability of the school. The school will be at capacity moving forwards but there is a surplus of places in Wakefield as a whole. The finances show a positive trend and the trust has healthy financial forecasts.
- The Board recommended further members be recruited to the Trust Board.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss Heckmondwike Primary School, Batley, to convert and join Delta Academies Trust.

AB Discussion:

- This item was considered together with Eastborough Junior Infant and Nursery School converting and joining the same trust.
- The Local Authority is supportive of the 2 schools joining Delta Academies Trust and Board members agreed this represented a good match.
- The Advisory Board commented on the generally strong outcomes of the trust but noted several of their schools have below average results for Key Stage 2. The Trust is considered to have sufficient primary expertise to secure improvements in its schools.
- An email representation was received from another Trust expressing interest in taking on Heckmondwike Primary School and shared verbally with the Board. It was noted that whilst there were other viable options locally, Delta is considered to have the appropriate capacity and expertise to support the school.
- The current membership of the Trust Board was discussed. Advisory Board members would encourage more diversity on the Board, where possible.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss Eastborough Junior Infant and Nursery School, Dewsbury, to convert and join Delta Academies Trust.

AB Discussion:

- This item was considered together with the consideration for Heckmondwike Primary School converting and joining the same trust.
- The Local Authority is supportive of the 2 schools joining Delta Academies Trust and Board Members agreed this represented a good match.
- The Advisory Board commented on the generally strong outcomes of the trust but noted several of their schools have below average results for Key Stage 2. The Trust is considered to have sufficient primary expertise to secure improvements in its schools.
- The current membership of the Trust Board was discussed. Advisory Board Members would encourage more diversity on the Board where possible.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Trust Change

Points discussed in relation to academies moving to another trust.

Project: To discuss Whitehill Academy, Halifax, (I-trust - to dissolve trust) joining Trinity Multi Academy Trust.

AB Discussion:

- Whitehill Community Academy (WCA) is an academy for 3-11 year olds located in Halifax, Calderdale. The school is a 3 form entry (FE) and was the founding school of the two-school MAT, I-trust Education, when the school converted to an academy in 2011. The second school is Wainstalls School, who joined the trust in 2013 and is a 1FE primary located in the rural village of Wainstalls, Calderdale.
- I-trust has lacked permanent leadership since the former Chair of the Trust stepped down in 2019. The Chair of Governors from Wainstalls was appointed as the interim Chair of the trust in October of that year. The school was subsequently judged 'Good' in January 2020.
- 17 emails of representations from parents raising concerns about the transfer were received and shared with the Board. There has been some friction between stakeholders such as the LGBs, trustees, members and staff. Over the past six months Regions Group has worked with the trust to minimise the disruption. More stakeholder interactions have started to take place since the summer term to support the school with the proposed transfer. Stakeholder management will remain critical to ensure that relationships between the school and incoming trust can flourish. The Delivery Officer took away an action to confirm the Diocese's view of the project.
- School's Financial Support and Oversight (SFSO) talked about the current and projected financial situation and confirmed that they didn't see a significant risk to the trust.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- Confirmation needed from the Diocese that they are supportive of proposal
- Delivery Officer to inform school / trust of the decision.

Project: To discuss Shirley Manor Primary School (Shirley Manor Academy), Bradford, joining The Family of Learning Trust

AB Discussion:

- This item was first discussed at the Yorkshire and Humber Advisory Board in June 2023. It was brought back to the July 2023 Advisory Board as the issues raised in June have now been addressed.
- The Delivery Officer confirmed that the Trust School Improvement Lead would provide leadership support to the school, having previously led the Trust's Dean Field school from an Inadequate Ofsted judgement to Good in 2022. Board recommended that the Trust engage with CEO and CFO mentoring with experienced leaders.
- DfE Capital colleagues have reviewed the building condition survey commissioned by the incoming trust which they deemed low risk.
- The Board considered the Trust's financial forecasts in light of current pressures on budgets and a School Resource Management Advisor (SRMA) was recommended.

RD decision: Approve with conditions

Conflicts: None

Further actions required:

- SRMA to be deployed to the Trust.
- Trust to engage with CEO and CFO mentoring.
- Delivery Officer to inform school / trust of the decision.

Project: To discuss St Bede's Catholic Primary School, Rotherham, (Single Academy Trust name: St Bede's Catholic Primary School, A Voluntary Academy) joining St Francis Catholic Multi Academy Trust

AB Discussion:

- This item was considered as part of four schools (St Bede's, St Mary's, St Gerard's and St Joseph's) who are applying for approval to join St Francis Catholic Multi Academy Trust.
- All four primary schools are small to medium sized primary schools that provide education in Rotherham to 3-11 year olds. These schools form part of the wider strategic plan to bring all the Diocese of Hallam catholic schools into a Catholic Multi-Academy Trust.
- Since approval to form the MAT was granted at the East Midlands and Humber Advisory Board in December 2021, monthly financial information is being received and a CFO has been appointed to the Trust.
- The Delivery Officer assured the Board that a natural pause is expected before the next stage of growth. Each school is going to pass its own resolution and it is expected that an External Review of Governance will be conducted in 2024. Board recommended that the trust split the finance and audit roles on their trust board.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss St Mary's Catholic Primary School, Rotherham, (Single Academy Trust name: St Mary's Catholic Primary School (Herringthorpe). A Catholic Voluntary Academy – all in Rotherham), joining St Francis Catholic Multi Academy Trust

AB Discussion:

- This item was considered as part of four schools (St Bede's, St Mary's, St Gerard's and St Joseph's) who are applying for approval to join St Francis Catholic Multi Academy Trust.
- All four primary schools are small to medium sized primary schools that provide education in Rotherham to 3-11 year olds. These schools form part of the wider strategic plan to bring all the Diocese of Hallam catholic schools into a Catholic Multi-Academy Trust.
- Since approval to form the MAT was granted at the East Midlands and Humber Advisory Board in December 2021, monthly financial information is now being received and a CFO has been appointed to the Trust.
- The Delivery Officer assured the Board that a natural pause is expected before the next stage of growth. Each school is going to pass their own resolution and it is expected that an External Review of Governance will be conducted in 2024. Board recommended that the trust split the finance and audit roles on their trust board.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss St Gerard's Catholic Primary School, Rotherham, (Single Academy Trust name: St Gerard's Primary) joining St Francis Catholic Multi Academy Trust

AB Discussion:

- This item was considered as part of four schools (St Bede's, St Mary's, St Gerard's and St Joseph's) who are applying for approval to join St Francis Catholic Multi Academy Trust.
- All four primary schools are small to medium sized primary schools that provide education in Rotherham to 3-11 year olds. These schools form part of the wider strategic plan to bring all of the Diocese of Hallam catholic schools into a Catholic Multi-Academy Trust.
- Since approval to form the MAT was granted at the East Midlands and Humber Advisory Board in December 2021 monthly financial information is now being received and a CFO has been appointed to the Trust.
- The Delivery Officer assured the Board that a natural pause is expected before the next stage of growth. Each school is going to pass their own resolution and it is expected that an External Review of Governance will be conducted in 2024. Board recommended that the trust split the finance and audit roles on their trust board.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

Project: To discuss St Josephs Catholic Primary School, Rotherham, (Single Academy Trust name: St Josephs Primary School, Dinnington. A Catholic Voluntary Academy) joining St Francis Catholic Multi Academy Trust

AB Discussion:

- This item was considered as part of four schools (St Bede's, St Mary's, St Gerard's and St Joseph's) who are applying for approval to join St Francis Catholic Multi Academy Trust.
- All four primary schools are small to medium sized primary schools that provide education in Rotherham to 3-11 year olds. These schools form part of the wider strategic plan to bring all the Diocese of Hallam catholic schools into a Catholic Multi-Academy Trust.
- Since approval to form the MAT was granted at the East Midlands and Humber Advisory Board in December 2021, monthly financial information is now being received and a CFO has been appointed to the Trust.
- The Delivery Officer assured the Board that a natural pause is expected before the next stage of growth. Each school is going to pass their own resolution and it is expected that an External Review of Governance will be conducted in 2024. Board recommended that the trust split the finance and audit roles on their trust board.

RD decision: Approve

Conflicts: None

Further actions required:

- Delivery Officer to inform school / trust of the decision.

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

Project: To discuss Sherburn Church of England Voluntary Controlled Primary School, North Yorkshire, joining Ebor Academy Trust

Type of decision: Sponsored Route

Reason for why it was taken off agenda: Further detail on the proposal is required.

Project : To discuss Luttons Community Primary School, North Yorkshire joining Ebor Academy Trust

Type of Decision: Sponsored Route

Reason for why it was taken off agenda: Further detail on the proposal is required.

Decisions taken between AB meetings.

List of decisions taken by the RD outside of AB meetings

Project: To discuss the creation of a Post-16 satellite site of Hilltop School (part of Nexus Multi Academy Trust) in Rotherham

Type of decision: Significant Change

Reason for why it was taken off agenda: Put on the Agenda to allow the opportunity for Reps to be made. Decision to be taken in August.

Project: To discuss the creation of a Post-16 satellite site of Kelford School (part of Nexus Multi Academy Trust) in Rotherham

Type of decision: Significant Change

Reason for why it was taken off agenda: Put on the Agenda to allow the opportunity for Reps to be made. Decision to be taken in August.

Project: To discuss Doncaster Local Authority Special Educational Needs and Disabilities sufficiency and the addition of a Special Educational Needs unit, with 10 places, at Ivanhoe Primary Academy

Type of decision: Significant Change

Reason for why it was taken off agenda: This was approved by the Regional Director prior to the Advisory Board.

Project: To discuss Doncaster Local Authority Special Educational Needs and Disabilities sufficiency and the addition of a Special Educational Needs unit, with 10 places, at Castle Hills Primary Academy (Leger Education Trust)

Type of decision: Significant Change

Reason for why it was taken off agenda: This was approved by the Regional Director prior to the Advisory Board.

Project: To discuss Doncaster Local Authority Special Educational Needs and Disabilities sufficiency and the addition of a Special Educational Needs unit, with 12 places, at Brooke Primary Academy (Venn Academy Trust)

Type of decision: Significant Change

Reason for why it was taken off agenda: This was approved by the Regional Director prior to the Advisory Board.

Decisions taken between AB meetings.

The below decision was taken by the Minister after being escalated at Advisory Board on 25 April.

Project: Discussion to consider White Rose Academies Trust academies (Alder Tree Primary Academy, Leeds, Leeds City Academy, Leeds, Leeds East Academy, Leeds and Leeds West Academy, Leeds) joining Wellspring Academy Trust.

Ministerial decision: Decline

- The minister did not have confidence that Wellspring has mainstream secondary phase strength and capacity to take on board three secondary academies.

Conflicts: Mark Wilson was not present and did not receive papers for this item.

Further actions required: Delivery Officer to inform school/trust of decision.

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