



Notes of meeting: South West

Date of meeting – 24 February 2025

Attendance

AB members who sent their apologies for the meeting but sent in their comments on agenda items, are listed under the apologies section. These members' views are reflected in the discussions below, unless the AB member(s) declared a conflict of interest.

Regional Director (RD) chair

- Lucy Livings, Regional Director, South West Region

Advisory Board (AB) members

- Steve Savory
- Stuart Ingram
- Adele Hayson
- Mark Ducker
- Jackie Fieldwick
- Margaret Simmons-Bird
- Rachel Howie
- Jennifer Blunden

Guests

- Joe Ambrose – RISE Adviser
- Siobhan Meredith – RISE Adviser

Apologies

- None

DfE senior civil servants

- Jessica Trahar, Deputy Director, South West Region
- Matthew Stevenson, Deputy Director, South West Region

General discussion points

- Lucy Livings provided an update for AB members on the priorities for Regions Group.

- Introduction to our first RISE advisers who joined to observe as part of their induction.
- AB members shared local intelligence and provided insight on the challenges being faced by the sector.

Decisions

Converter academy orders

Points discussed in relation to school conversion.

Project: An application from The Lampard Community School (URN113637), Devon to convert and become an academy and join Special Partnership Trust.

Representations received:

- No representations were made for this project.

Points raised in Discussion: The board members considered the details of the project and did not raise any concerns/comments in relation to the recommendation.

RD decision: Approve

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application from Horfield Church of England Primary School (URN 109143), Bristol, City of to convert and become an academy and join Lighthouse Schools Partnership.

Representations received:

- No representations were made for this project.

Points raised in Discussion: The board members considered the details of the project and did not raise any concerns/comments in relation to the recommendation.

RD decision: Approve

Conflicts: Lucy Livings and Adele Haysom were not present for the discussion and did not receive the project papers.

- This project was reviewed and approved by the Regional Director for London Regions Group, Claire Burton.

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application from Five Lanes CofE VC Primary School (URN 133233), Wiltshire to convert and become an academy and join Equa Mead Learning Trust.

Project: An application from Urchfont Church of England Primary School (URN 126366), Wiltshire to convert and become an academy and join Equa Mead Learning Trust.

Project: An application from Paxcroft Primary School (URN 126483), Wiltshire to convert and become an academy and join Equa Mead Learning Trust.

Representations received: ** all projects for Equa Mead Learning Trust were discussed together.

- No representations were made for this project.

AB Discussion:

- All three schools have applied to voluntarily convert to academy status and join Equa Mead Learning Trust (EMLT).
- Urchfont Church of England Primary School is a 4-11 voluntary controlled primary school and received a Good Ofsted judgement in May 2023.
- Five Lanes CofE VC Primary School is a 4-11 voluntary controlled primary school and received a second Requires Improvement Ofsted judgement in June 2024.
- Paxcroft Primary School is a 4-11 foundation primary school and received a Good Ofsted judgement in March 2024.
- The schools' leaders consider that by joining EMLT, there will be enhanced opportunities and resources for their children. Additionally, leaders say that all children and young people will benefit from a more diverse curriculum, and a vision and values that align with their own.
- The governance and structure of the board was discussed. The trust has 12 trustees and 7 members. The trust plans to have up to 8 members and they recognise this is a larger number than most trusts. On approval of the merger of Equa and Mead in February 2024, the Regional Director recommended an external review of governance, and this is due within the next 6 months.

RD decision: Approve

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application from Abbeyfield School (URN 131969), Wiltshire to convert and become an academy and join The AthelstanTrust.

Project: An application from Kings Lodge Primary School (URN 126287), Wiltshire to convert and become an academy and join The AthelstanTrust.

Project: An application from Charter Primary School (URN 126292), Wiltshire to convert and become an academy and join The AthelstanTrust.

Representations received: ** all projects for The Athelstan Trust were discussed together.

- One representation was made for this project.

When received in time, representations are shared in advance of the meeting with all attendees, who considered them alongside the corresponding item.

Points raised in Discussion:

- All three schools have applied to voluntarily convert to academy status and join The Athelstan Trust.
- Abbeyfield School received a Good Ofsted judgement in November 2022.
- Kings Lodge Primary received a Good Ofsted judgement in November 2021.
- Charter Primary received a Requires Improvement Ofsted judgement in July 2024.
- The schools are beginning to work together and have a history of collaboration.
- The financial position of Abbeyfield was discussed. Abbeyfield's financial position is improving. The Schools Financial Support and Oversight directorate (SFSO) will continue ongoing monitoring and on approval would require quarterly updates. Regions Group with the SFSO will discuss this with the trust.
- It was recommended that as the trust grows, the trust considers a review of its school improvement model and how to develop the model in line with trust growth.
- The diversity of the trust board and the educational expertise across primary was discussed. Regions Group will discuss the trust's plans to address this issue and will recommend partnering with a primary trust with a strong track record of improving outcomes.
- It is recommended that the incoming Athelstan CEO has a mentor to provide positive and constructive support as the trust grows, and to take part in the DfE 'Working with Regions Group' programme. Regions Group will discuss this with the trust and CEO and provide suggestions.

RD decision: Approve with conditions

- The Athelstan Trust to partner with a trust that has strong primary expertise and led by an experienced MAT CEO to carry out a review of the trust's school improvement strategy and effectiveness. (Regions Group to suggest suitable trusts for this role).
- Quarterly financial monitoring of the trust and the management of Abbeyfield School's deficit by SFSO.

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application from Crossways Infant School (URN109049), South Gloucestershire to convert and become an academy and join The Leaf Trust.

Project: An application from Crossways Junior School (URN109040), South Gloucestershire to convert and become an academy and join The Leaf Trust.

Project: An application from Sea Mills Primary School (URN 135779), Bristol, City of to convert and become an academy and join The Leaf Trust.

Representations received: ** all projects for The Leaf Trust were discussed together.

- No representations were made for this project.

Points raised in Discussion:

- All three schools have applied to voluntarily convert to academy status and join The Leaf Trust.
- Crossways Infant and Junior Schools (federated) share The Leaf Trust's vision and values and will benefit from unified support while keeping their unique identities.
- Crossways Infant School received a 'Requires Improvement' judgement from Ofsted in October 2023, while Crossways Junior School received a 'Good' judgement in June 2024.
- Sea Mills Primary School will gain from experienced leaders, collaboration, and professional development, while keeping its strong local community and unique identity with The Leaf Trust's support. The school received a 'Good' judgement from Ofsted in June 2023
- All three schools are already working with The Leaf Trust. Leaf has supported leadership at the Crossways schools and provided leadership support and improvement planning at Sea Mills.
- The Leaf Trust was established in September 2023 and as a new trust does not have a proven track record of performance. However, Regions Group recognised the experienced leadership in the trust.
- The growth strategy of the trust was discussed with a period of consolidation recommended. Regions Group will continue to discuss growth plans with the trust and will continue to make future growth decisions based on the High-Quality Trust Framework.

RD decision: Approve

Conflicts: Margaret Simmons-Bird and Mark Ducker were not present for the discussion and did not receive the project papers.

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application from St Benedict's Catholic Primary School (URN 123840), Somerset to convert and become an academy and join The Dunstan Catholic Educational Trust.

Project: An application from St Mary's Catholic Primary School (URN 109261), Bath and North East Somerset to convert and become an academy and join The Dunstan Catholic Educational Trust.

Project: An application from St John's Catholic Primary School (URN 109260), Bath and North East Somerset to convert and become an academy and join The Dunstan Catholic Educational Trust.

Representations received: ** all projects for The Dunstan Catholic Academy Trust were discussed together.

- No representations were made for this project.

Points raised in Discussion:

- All three schools have applied to voluntarily convert to academy status and join The Dunstan Catholic Educational Trust (DCET).
- St Mary's Catholic Primary School received a Good Ofsted judgement in October 2018 and has consistently maintained Good or Outstanding judgements since opening.

- St Benedict's Catholic Primary School received a Requires Improvement Ofsted judgement in May 2023.
- St John's Catholic Primary School received a Good Ofsted judgement in September 2023.
- The schools believe that conversion offers key benefits: preserving the Catholic vision and ethos, enhancing opportunities for teachers to share knowledge, achieving cost savings through bulk purchasing, providing new leadership and career opportunities, promoting job security for staff, and reducing duplication of work for leaders.
- Established in 2022, DCET is a ten-school Catholic trust with a presence in Somerset, North Somerset, BANES and Wiltshire.
- The proposal for these schools to convert and join DCET is aligned with the Bishop's vision and strategic plan.
- The growth strategy of the trust was discussed with a period of consolidation recommended. Regions Group will continue to discuss growth plans with the trust and will continue to make future growth decisions based on the High-Quality Trust Framework.
- The diversity of the trust board was discussed and the benefits of an external review of governance and the addition of individuals with specific skills and the appropriate level of support and strength to challenge. This will be raised with the trust by Regions Group.
- It is recommended for the chair to have a mentor to provide positive and constructive support as the trust grows. Regions Group will provide suggestions.

RD decision: Approve with conditions

- The Dunstan Catholic Educational Trust should commission a review of their School Improvement Strategy and structures from a trust that has strong expertise in this area. The outcomes of this review should be shared with Regions Group ahead of any decisions about future growth. (Suitable trusts for this role to be suggested by and agreed with Regions Group).

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Significant changes to an open academy

Points discussed in relation to significant changes to an open academy

Project: An application for St Martin's Garden Primary School (URN 16156), Bath and North East Somerset (Palladian Academy Trust) to make the following change:

To expand the existing resource base, increasing capacity from 34 to 60 places.

Project: An application for An application for Ralph Allen School (URN 138522), Bath and North East Somerset (Palladian Academy Trust) to make the following change:

- To establish a 20-place resource base for pupils with ASD (Autism Spectrum Disorder) and complex needs.

Representations received: ** all projects for The Palladian Academy Trust were discussed together.

- No representations were made for this project.

Points raised in Discussion:

- The Margaret Coates Centre (MCC) at St Martins Gardens (SMG) supports pupils with ASD and complex needs.
- The proposal seeks to increase MCC's capacity from 34 to 60 places by repurposing two unused classrooms within SMG, requiring minimal refurbishment funded by the local authority - Bath and North East Somerset Council.
- Creating a New Resource Base at Ralph Allen School (RAS). The plan includes building a single-storey rooftop extension on the Design and Technology (DT) block to set up a SEND Resource Base (RB) for up to 20 pupils, with a focus on ASD support.
- There is a growing need for specialist ASD provision in BANES. Expanding the MCC at SMG will increase capacity for high-needs pupils, while the new resource base at RAS will enhance inclusion and support the transition from the primary to the secondary phase.
- The financial position of SMG was discussed and financial pressures for the trust. This is being managed through ongoing monitoring by the SFSO Directorate.
- Regions Group will continue to collaborate closely with the trust, holding regular strategic conversations to review progress.
- AB members discussed the recruitment of a permanent headteacher at SMG. It is important that the new headteacher can manage the expanded needs of the resource base. Regions Group are in discussion with the trust to ensure that support is in place.

RD decision: Approve

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application for Horizons Therapeutic Education Trust (SAT) (URN 150859), Somerset (Horizons Therapeutic Education Trust) to make the following change:

- To open a satellite site in Wellington to provide therapeutic education for 15 pupils with complex needs.

Representations received: No representations were made for this project.

Points raised in Discussion:

- Horizons Therapeutic Education Trust (HTET) is a single academy trust (SAT) alternative provision (AP) free school in Somerset. Opened in September 2024, it is designed to provide therapeutic education for young people with complex needs.
- This project has a multi-agency approach led by Somerset LA, Shaw Trust and NHS Somerset Foundation.
- This proposal will enhance curriculum provision, addressing the priority needs for specialist education in Somerset for children with complex needs.
- AB Members asked about the assessment of learning outcomes. This will be

discussed with the trust and Regions Group as they move into this new phase.

- The trust plans to appoint an external advisor to help with curriculum development, reintegration pathways, and student progress tracking.
- On approval of the opening of Horizons in September 2024 a condition was put in place that required appointment of a 5th member and Regions Group will request an update from the trust on progress.
- The current provision is operating effectively, and outcomes are positive. Regular meetings between the trust and Regions Group are held to monitor its development and delivery, with financial oversight provided by the ESFA.
- The AB members recommended implementing a quality assurance framework, which the trust is already actively exploring for implementation.

RD decision: Approve

Conflicts: None

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Project: An application for Moat Primary Academy (URN 144472) and Robinswood Primary Academy (URN 136528), Gloucestershire (Greenshaw Learning Trust) to make the following change:

- To merge Moat Primary Academy with Robinswood Primary Academy, and form one entity on the site of Robinswood Primary Academy.

Representations received:

- Eight representations were received for this project.

When received in time, representations are shared in advance of the meeting with all attendees, who considered them alongside the corresponding item.

Points raised in Discussion:

- Greenshaw Learning Trust (GLT) is seeking approval to merge two nearby schools, Moat Primary Academy and Robinswood Primary Academy, and to extend the age range at Robinswood to reflect the current 2-4 age range at Moat nursery.
- Moat Primary Academy is situated in the Matson area in the south of Gloucester City. The school joined GLT in November 2023. Moat currently has 127 pupils against a 234 capacity. The site at Moat is in a poor state of repair and is in scope for a full rebuild under the School Rebuilding Programme (SRP).
- Robinswood Primary Academy is also situated in the Matson area of Gloucester. The school joined GLT in November 2023. Robinswood currently has 375 pupils, against a 480 capacity.
- With falling pupil numbers in the area, the trust has concerns that the Moat pupils are not able to access as broad and balanced curriculum as they would like to offer. GLT are confident that one, larger school in Matson would enhance educational provision, as it would be better resourced and structured.
- All representations received were discussed with AB members and the key points were outlined, particularly from the parent community, in regard to the consultation process and practicalities of the proposal. Representations about the change from

the local MP and councillor were also noted. Assurances were provided by Regions Group that the points raised will be addressed with the trust.

- The Trust's communication and consultation approach with the community was discussed. AB members emphasised the necessity for enhanced and ongoing communication with the community, and that the Trust must now carefully work with parents, staff, pupils and the LA in the lead-up to the merger and provide reassurances to all stakeholders involved. Regions Group will work closely with Greenshaw Learning Trust in this regard.

RD decision: Approve

Conflicts: Joe Ambrose was not present for the discussion and did not receive the project papers.

Further actions required: Delivery officer to inform the schools, trust and Diocese (where relevant).

Academy opening approved in principle

List of academies approved to open the following month.

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: Churchfields, The Village School, Wiltshire (Palladian Academy Trust)

Points raised in discussion: No questions or concerns were raised.

Opening date 1 March 2025

Conflicts: None.

Further actions required: No action required.

Project: Baltonsborough Church of England Voluntary Controlled Primary School, Somerset (The Academies For Character And Excellence).

Points raised in discussion: No questions or concerns were raised.

Opening date 1 March 2025

Conflicts: None.

Further actions required: No action required.

Project: Marwood School, Devon (Ventrus Limited).

Points raised in discussion: No questions or concerns were raised.

Opening date 1 March 2025

Conflicts: None.

Further actions required: No action required.

Project: Milborne Port Primary School, Somerset (The Academies For Character And Excellence).

Points raised in discussion: No questions or concerns were raised.

Opening date 1 March 2025

Conflicts: None.

Further actions required: No action required.

Project: Stoberry Park School, Somerset (The Academies For Character And Excellence).

Points raised in discussion: No questions or concerns were raised.

Opening date 1 March 2025

Conflicts: None.

Further actions required: No action required.

Decisions taken outside of AB meetings

List of decisions taken outside of AB meetings.

None

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

Project: Baytree School (URN 109409), North Somerset to convert and become an academy and join Achieve MAT (currently Three Ways School, (SAT)).

Type of project: Converter Academy Order

Reason for why it was taken off agenda: Applications delayed until April Advisory Board

Project: Westhaven School (URN109406), North Somerset to convert and become an academy and join Achieve MAT (currently Three Ways School, (SAT)).

Type of project: Converter Academy Order

Reason for why it was taken off agenda: Applications delayed until April Advisory Board.

Project: Ravenswood School (URN 109407), North Somerset to convert and become an academy and join Achieve MAT (currently Three Ways School, (SAT)).

Type of project: Converter Academy Order

Reason for why it was taken off agenda: School withdrew application.

Project: Warmley Park School (URN 109403), South Gloucestershire to convert and become an academy and join Achieve MAT (currently Three Ways School, (SAT)).

Type of project: Converter Academy Order

Reason for why it was taken off agenda: Applications delayed until April Advisory Board.

Project: Three Ways School (URN 140079), Bath and North East Somerset to transfer from Three Ways School, (SAT) and form Achieve MAT.

Type of project: Trust Change

Reason for why it was taken off agenda: Applications delayed until April Advisory Board.

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