



Department
for Education

Notes of meeting: South West Advisory Board

Date of meeting: 23 June 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
- Adele Haysom
- Mark Ducker
- Stuart Ingram
- Jackie Fieldwick
- Jennifer Blunden

Guests

- None

Apologies

- Rachel Howie
- Margaret Simmons-Bird

DfE senior civil servants

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

Decisions

Converter academy orders

Project: An application from Chilmark and Fonthill Bishop Church of England Aided Primary School (URN 126438), Wiltshire to convert and become an academy and join Acorn Education Trust.

Representations received:

- No representations were made for this project.

Points raised in discussion:

- Chilmark and Fonthill Bishop is a Voluntary Aided school, this is a voluntary conversion. The school was rated as Good across all categories at their last Ofsted inspection (September 2023) and Requires Improvement in the previous Ofsted inspection (November 2019).
- Acorn Education Trust (AET) is one of the largest Wiltshire trusts and has a detailed knowledge of the Wiltshire educational landscape. They have a proven record of improving outcomes over a period of time and sustaining these improvements.
- The school consider AET best placed to provide effective support and services to maintain the school and continue its improvement moving forward.
- Acorn believes that Chilmark will be able to bring settled staff who can work with other parts of the small schools' hub to build subject knowledge and teaching practice capacity.
- Both the Local Authority and The Diocese of Salisbury are supportive of this conversion.
- AB members discussed the diversity of the trust board and the value of including more members with educational expertise to enhance both support and the ability to provide effective challenge. Regions Group will recommend that the trust commission an external governance review or, if undertaken recently, to provide this for further consideration.
- The Trust's school improvement model was discussed and the importance of this developing as the trust grows. It was recommended that the Trust considers a review of the school improvement model and how to develop this in line with trust growth to ensure it is clear on their ambitions for outcomes and key milestones. Regions Group provided assurances that this will be reviewed and will agree with the trust the reviewer and for the trust the share the report. It was noted that the Trust has benefited from ongoing support from Greenshaw Learning Trust, which will continue.
- The current CEO will step down in September, and AB members asked about the support planned for the incoming CEO. It was recommended that they have a mentor to provide constructive and positive guidance during the transition.

RD decision: Approve with conditions

- To ensure clear separation between the layers of governance.

Conflicts: None

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

Trust Changes

Project: A proposal for the following nine academies from The Olympus Academy Trust, South Gloucestershire to merge with Futura Learning Partnership and form a new trust, Halcyon:

- Bradley Stoke Community School (URN 137753), **South Gloucestershire**
- Abbeywood Community School (URN 139067), **South Gloucestershire**
- Stoke Lodge Primary School (URN 140259), **South Gloucestershire**
- Meadowbrook Primary School (URN 141618), **South Gloucestershire**
- Charborough Road Primary School (URN 141638), **South Gloucestershire**
- Callicroft Primary School (URN 142342), **South Gloucestershire**
- Filton Hill Primary School (URN 143408), **South Gloucestershire**
- Patchway Community School (URN 145124), **South Gloucestershire**
- Winterbourne Academy (URN145502), **South Gloucestershire**

Representations received:

- Thirteen representations were received for this project.
- When received in time, representations were shared in advance with the RD and the AB members, who considered them when providing advice.

AB discussion:

- This is a voluntary application from two Trusts to re-structure – Olympus Academy Trust (OAT) and Futura Learning Partnership (FLP) to merge, bringing together the individual strengths of both Trusts to form one MAT and improve the overall offer available to children.
- The proposal emphasises the Trusts' commitment to a shared vision and alignment of values and consider the adoption of a new name and re-branding as important in signifying the MAT as new entity, Halycon Trust.
- The proposed merger between Futura and Olympus will bring together two similar, like-minded trusts to create a large Trust with increased capacity, expertise and financial resilience that will support it to improve schools.
- The proposed merged trust would consist of 36 academies made up of 25 primary, 9 secondary and 1 all-through with 1 additional secondary (Lyde Green Community School) set to open in 2026.
- The Trust's financial position was discussed. The Schools Financial Support and Oversight (SFSO) Directorate provided comment on the trusts finances and confirmed that termly monitoring meetings will continue. The Trust has previously engaged a Schools Resource Management Advisor (SRMA) and has requested a further deployment, scheduled to begin in August 2025.

- Secondary performance at both Olympus and Futura is weaker than Primary. It is recommended to prioritise secondary improvement during and following the merger with termly meetings established between the trusts and the Department to hear how the trusts are prioritising resource and expertise for those schools that need it most.
- The new trust will be one of the largest in the South West. Sir Jon Coles, the CEO of United Learning, has agreed to formally mentor Gary Schlick to provide constructive and positive guidance during the transition.
- Additionally, it is recommended for the Chair Richard Thomas to join the Chair's learning set and put in place a mentor with relevant experience as a chair of a large South West trust.
- The structure and diversity of the trust board for the new trust was discussed, with emphasis on the value of appointing members external to both existing trusts to strengthen governance through enhanced support and effective challenge.

RD decision: Approve with conditions

- To provide the Department with the detailed process they are following with respect to trustee recruitment, prioritising skills and diversity.
- To provide the Department with updates on trustee recruitment ensuring the appointment of at least 3 new external trustees and a trustee with secondary expertise.
- To meet termly with SFSO to discuss monthly management accounts and provide financial updates.
- To review lessons learnt from the previous merger reflecting particularly on the themes in the representations from Clevedon School, to ensure there are strong relationships, communications and governance arrangements with their schools and communities they serve.

Conflicts: Steve Savory, Margaret Simmons-Bird and Adele Haysom were not present for the discussion and did not receive the papers.

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

Project: A proposal for the following five academies from Castleman Academy Trust, to merge with The Delta Education Trust:

- Ferndown Middle School (URN 148163), **Dorset**
- Ferndown First School (URN 148161), **Dorset**
- Parley First School (URN 148162), **Dorset**
- Broadstone Middle School (URN 141184), **Bournemouth, Christchurch and Poole**
- Broadstone First School (URN 141258), **Bournemouth, Christchurch and Poole**

Representations received:

- No representations were made for this project.

Points raised in discussion:

- This proposal was discussed at the South West Advisory Board of 28 April 2025, the notes of this meeting are published on the gov.uk website.
- The board considered the assurances provided and agreed that the trust had responded to the points raised.
- AB members discussed the diversity of the trust board and the value of including trustees external to both current trusts, to enhance support and the ability to provide effective challenge. It was noted that there should be a separation across member and trustee roles. Regions Group will recommend that the trust commission an external governance review.
- Recommendation that the trust recruit some external expertise for the new trust board.
- A Member of one of the trusts was previously its CEO. Clarification sought that they were no longer in paid employment of the trust. Regions Group has confirmed that the Member is retired and acting on a voluntary basis in their current role within the trust.

RD decision: Approve

Conflicts: Adele Haysom was not present for the discussion and did not receive the 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: Charter Primary School, Wiltshire, (The Athelstan Trust)

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

Opening date 1 July 2025

- Conflicts: None.
- Further actions required: No action required.

Project: Kings Lodge Primary School, Wiltshire (The Athelstan Trust)

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

Opening date 1 July 2025

- Conflicts: None.
- Further actions required: No action required.

Project: Pathways Learning Centre, South Gloucestershire (Enable Trust)

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

Opening date 1 July 2025

- Conflicts: None.
- Further actions required: No action required.

Project: Ilchester Community School, Somerset (Preston Primary Academy Trust)

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

Opening date 1 June 2025

- Conflicts: None.
- Further actions required: No action required.

Project: St Benedict's Catholic Primary School, Somerset (The Dunstan Catholic Educational Trust)

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

Opening date 1 June 2025

- Conflicts: None.
- Further actions required: No action required.

Project: St John's Catholic Primary School, Bath and North East Somerset (The Dunstan Catholic Educational Trust)

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

Opening date 1 June 2025

- Conflicts: None.
- Further actions required: No action required.

Project: St Mary's Catholic Primary School, Bath and North East Somerset (The Dunstan Catholic Educational Trust)

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

Opening date 1 June 2025

- Conflicts: None.
- Further actions required: No action required.

Decisions taken outside of AB meeting

List of decisions taken outside of AB meetings.

Significant changes to an open academy

Project: Millbay Academy, Plymouth, (Reach South Academy Trust) to make the following change:

- To change the age range 3-16 to 11-16 years, removing the primary provision.

RD decision: Approve

Conflicts: None

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

Project: Maiden Beech Academy, Somerset (Bridgwater & Taunton College Trust) to make the following change:

- To add a 30-place resource base for children with Autism Spectrum Disorder (ASD).

RD decision: Approve

Conflicts: None

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

Project: Hatch Beauchamp Church of England Primary School (The Academies for Character and Excellence) to make the following change:

- To add a 6-8 place special education needs resource base.

RD decision: Approve

Conflicts: None

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

Project: Burnham-On-Sea Infant School, Somerset (The Priory Learning Trust) to make the following change:

- To add a 6-8 place resource base for children with Speech Language and Communication Needs (SLCN).

RD decision: Approve

Conflicts: None

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

Project: Swindon Academy, Swindon (United Learning Trust) to make the following change:

- A retrospective change in age range from 3-19 to 2-19.
- Addition of physical capacity from 1680 to 2100.

RD decision: Approve

Conflicts: None

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

Project: St Nicholas Church of England Primary School, Bromham, Wiltshire (EQUA Mead learning Trust) to make the following change:

- To change the age range from 4-11 to 2-11 to include nursery provision

RD decision: Approve

Conflicts: None

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

Project: Avon Valley Academy, Wiltshire (Acorn Education Trust) to make the following change:

- To add a 20-place resource base for children with Cognition and Learning needs.

RD decision: Approve

Conflicts: None

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

Project: Oasis Academy Bank Leaze, Bristol, City of (Oasis Community Learning) to make the following change:

- To change the age range from 3-11 to 2-11, increasing the current nursery provision by 20 places.

RD decision: Approve

Conflicts: None

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

Project: King Edward VI Community College, Devon (Education South West) to make the following change:

- To add a 20-place resource base for children with Autistic Spectrum Condition (ASC)

RD decision: Approve

Conflicts: None

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

Project: St Michael's Church of England Primary School, Devon (St Christopher's C of E (Primary) Multi Academy Trust to make the following change:

- To change the age range from 5-11 to 2-11 to include nursery provision.

RD decision: Approve

Conflicts: None

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

Project: Southbroom St James Academy, Wiltshire (Diocese of Salisbury Academy Trust) to make the following change:

- To change the listed physical capacity to accurately reflect the recent net capacity assessment.

RD decision: Approve

Conflicts: None

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

Project: Marden Vale CofE Academy, Wiltshire (Diocese of Salisbury Academy Trust) to make the following changes:

- To change the listed physical capacity to accurately reflect the recent net capacity assessment.

RD decision: Approve

Conflicts: None

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

Project: Severn Beach Primary School, South Gloucestershire (Castle School Education Trust) to make the following changes:

- To change the age range from 2-11 from 4-11 to include nursery provision.

RD decision: Approve

Conflicts: None

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

Project: Robert Le Kyng Primary School, Swindon (The Blue Kite Academy Trust) to make the following changes:

- To add a 24-place resource base for pupils with Complex learning needs.

RD decision: Approve

Conflicts: None

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

Project: Nyland School, Swindon (The White Horse Federation) to make the following changes:

- A retrospective to increase physical capacity from 2020.

RD decision: Approve

Conflicts: None

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

Project: Sarum Academy, Wiltshire (Magna Learning Partnership) to make the following changes:

- Change of age range from 11-18 to 11-16, closure of the sixth form provision.

RD decision: Approve

Conflicts: None

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

Project: Oasis Academy Brislington, Bristol, City of (Oasis Community Learning) to make the following changes:

- A retrospective change of age range from 11-18 to 11-16, closure of the sixth form provision.

RD decision: Approve

Conflicts: None

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

Project: Oasis Academy Brightstowe, Bristol, City of (Oasis Community Learning) to make the following changes:

- A retrospective change of age range from 11-19 to 11-16, closure of the sixth form provision.

RD decision: Approve

Conflicts: None

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

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

None

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