



Business Plan 2017-2022 (Reviewed Feb 2018)

Introduction

Advance Trust is a multi-academy trust (MAT) established in April 2013 by Vale of Evesham School. As a result of its high performing reputation a sponsor arrangement for three new academies was put in place with the DfE for Kingfisher and Riversides (both schools judged 'Good' by OFSTED) who joined in January 2014 followed by Newbridge in April 2014.

The aim of this arrangement is to promote high performance in each school within the Trust, and to secure the best arrangements for meeting the needs of every student, including a review of buildings, funding and ensuring a collaborative vision for Advance Trust, in which the collective progress and development exceeds the reach of each individual school.

The MAT will develop a vision for meeting the additional learning needs of students within our schools, which may involve pooling resources, buildings, funding or other resources. We will develop and implement a Mental Health Strategy which will ensure that our response to meeting need is holistic and closely linked to current educational research and a developing understanding of how children mature and learn.

As academies within the MAT develop they will be expected to share their skills and expertise with other MAT academies. The MAT will encourage and nurture the dissemination of good practice, fostering a self-sustaining culture of aspiration for educational excellence, and look for ways to develop the MAT further by growing business connections and involving wider stakeholders with a view to including another academy into the MAT to work closely with Vale of Evesham in particular.

Vision and Guiding Principles

We will place learning at the heart of our community; creating a group of academies to support learners of all ages and will actively work to make connections with the world of work to secure a better future for every student.

We will ensure that our staff have a well-developed understanding of the medical and social reasons for each child or young person's additional learning need. By linking our knowledge and understanding to current practice and research, we can further develop the provision within each school. We will ensure we place resources based on assessed need and include children and young people within our academies who may otherwise find accessing education very challenging.

Advance Trust aims to provide appropriate and well- resourced facilities and to attract and retain the highest calibre staff to the organisation.

Advance Trust operates within the 7 Principles of Public Office first published in 1995. These are:

1. Selflessness
2. Integrity
3. Objectivity
4. Accountability
5. Openness
6. Honesty
7. Leadership

Our core purposes

- to work with children and young people and their families to support successful learning that will help them to secure a better future.
- To develop a workforce which is able to be flexible to meet the need of every child or young person within our academies.
- To ensure the buildings we operate within are fit for purpose and enable us to develop confident happy minds while also keeping every member of the MAT community safe.

We shall do this by:

- providing challenging and relevant opportunities for learning for all – we take the term “learning” in its broadest sense to include foundation learning, readiness to learn and also teaching skills for resilience, developing self- confidence and achieving good mental health.
- providing a methodical, caring environment that promotes social responsibility and moral awareness

- We pool resources – personnel, educational resources, and where necessary budget to ensure equality of opportunity is not limited by funding,
- developing self-esteem, mutual respect and the motivation to succeed whatever the challenges
- developing partnerships with our wider community that will enhance community wide learning
- developing pupil empathy and an understanding of diversity
- developing our capacity to provide for the needs of learners of all ages

The core values that underpin our work

- We recognise that everyone is of equal worth and has a valuable contribution to make.
- We will develop a culture of high aspiration, strong leadership and clear lines of accountability which are underpinned by strong management systems within a professional learning environment.
- We work collaboratively, sharing good ideas and best practice based on sound research.
- We are concerned at all times for our own health and safety and that of others and actively promote an organisational ethos where well- being is a priority.
- We seek ways always to remain positive, enthusiastic and optimistic about our work, to safeguard our mental health and that of every student and to promote all that we do well within our local community.
- We recognise students, staff and school leaders as individual learners whom we shall support to develop high levels of skill and understanding and to keep abreast of current best practice.

Target Position 2015 – 2018 (these were already revised from the original document)

- 1. Our aim is to support all of our existing academies to be judged by Ofsted as *at least good*, with the capacity to become outstanding.**
- 2. All pupils will make progress that is judged as at least good as a result of clear analysis and intervention**
- 3. All teaching across the Trust will be at least good, with the majority outstanding.**

4. **There will be maximum capacity for pupil admissions.**
5. **Strong governance is evident across all academies.**
6. **Strong leadership is recognised across all academies by an external verifier.**
7. **There will be a therapeutic offer for pupils within the Trust and where appropriate on offer to the wider community**
8. **The potential to develop residential provision will be explored.**
9. **Provision for Trust pupils post school will be considered.**
10. **A purpose built school for Riversides School based on 1 site.**
11. **To source additional funding mechanisms including third party income for specific projects**

Targets 2017-2022

1. To develop a Mental Health Strategy which will underpin provision for Social Emotional and Mental Health needs of children and young people within Advance Trust
2. To review funding coming in to the MAT to ensure resource allocation is fair for all students, and that we have the capital to invest for the benefit of every child and young person.
3. To consider the use of different sites within the MAT to enable a strategic overview that exceeds any possible from an individual academy level.
4. To attract another academy for generic learning need to join Advance Trust. Fully scope for out of county academies, specifically to link with Vale of Evesham and support professional development and challenge within and between these two schools.
5. To continue to engage with the local authority and politicians in their role as “corporate parent” to secure best funding and access to appropriate buildings for Newbridge and Riversides academies.
6. To include development for residential provision for SEMH, and a further development for residential provision at Vale of Evesham in the long term planning for Advance Trust.
7. To look to develop post 16 learning for young people with SEMH, firmly linked to employment and enterprise.
8. To support all of our existing academies to be judged by Ofsted as *at least* good, with the capacity to become outstanding.
9. All pupils will make progress that is judged as at least good as a result of clear analysis and intervention
10. All teaching across the Trust will be at least good, with the majority outstanding.
11. Strong governance is evident across all academies.
12. Strong leadership is recognised across all academies by an external verifier.

The Business Implementation Strategy each year links targets to each of these broad aims. Please refer to current document.

Our Academies

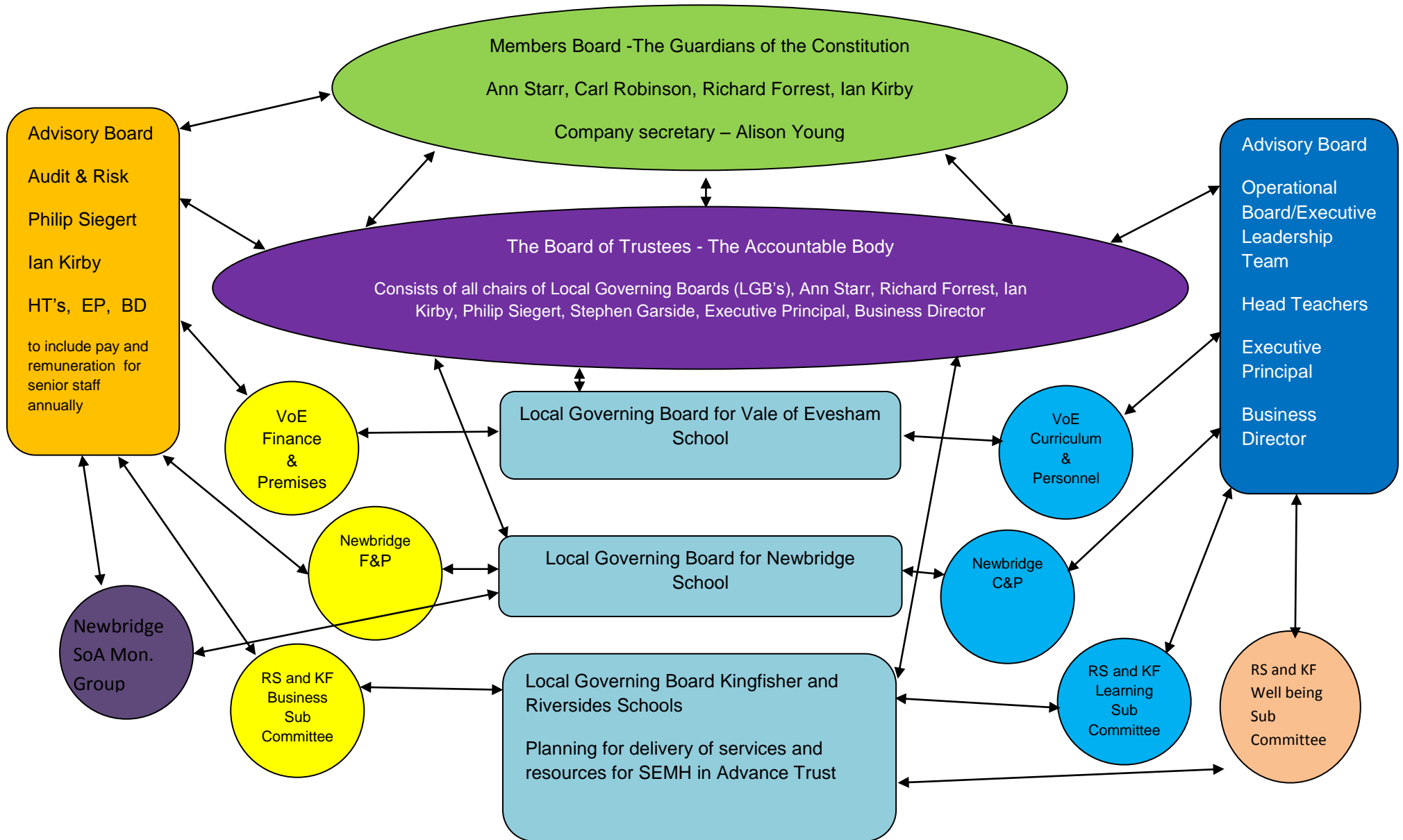
- **Kingfisher School**
A school for pupils with (SEMH) Social, Emotional Mental Health difficulties aged from 7-16 years in Redditch, with 70 planned places.
- **Newbridge School**
A short stay school for pupils at Key stage 3 & 4 in Worcester City with 65 places with high needs funding commissioned by WCC leaving 3 other places which could be offered elsewhere.
- **Riversides School**
A school for pupils with (SEMH) Social, Emotional Mental Health difficulties aged from 7-16 years in Worcester City, with 68 planned places.
- **Vale of Evesham School**
A broad spectrum special school for pupils aged 2-19 with weekly boarding provision for 15 pupils. There are 172 planned commissioned places which includes 10 full time equivalent nursery assessment places.

The Board of Directors

The Board of Directors have a clear link into each LGB (Local Governing Board) via the Chairs of Governors in their role of Trustees. Key Policies are developed at Trust level for local agreement and implementation the use of IT allows all board members to have oversight of the work of LGB's. This also allows governors to network and to access key documents from the Trust Governor website.

Advance Trust Governance Structure follows on next page:

Governance Model for Advance Trust



Governance responsibilities within Advance Trust

The responsibilities of each of the Local Governing Bodies (LGB's) within Advance Trust are mapped against those responsibilities held centrally by the Trust Board of Directors.

The executive leadership team (ELT) which consists of all Head Teacher's, Executive Principal, Business Director and invited others have operational overview of the work of the Trust and report back to the Trust Board.

Advance Trust responsibilities **Governance**

- Development of Advance Trust vision and core values
- Determining the level of delegation to each local governing body
- Governance management

Strategic Management

- Business Plan development
- Recruitment of Headteachers, and Deputy Headteachers (jointly with the local governing body)
- Performance Management of the Executive Principal
- Performance Management of the Business Director
- Performance Management of the Headteachers and Deputy Headteachers (jointly with the local Chair of Governors)
- Personalised Service Level Agreement for each school reviewed annually.
- Schools performance against KPIs
- Schools budget forecast approval
- Staff pay and conditions
- Schools admissions and appeals
- Marketing and public relations
- Statutory and HR policies
- Oversight of major premises changes

Local Governing Body responsibilities **Monitoring**

- Implementation of Advance Trust vision and core values
- Curriculum provision
- Quality of the classroom experience
- Pupil attainment and progress
- Pupil attendance and punctuality
- Enrichment activities (clubs, visits, extracurricular activities)
- School improvement plan development and implementation
- Budget management
- Special educational needs provision
- Statutory compliance and risk management
- Student behaviour and safety
- Student exclusions and appeals
- Governor training

Management

- Recruitment of school staff according to agreed organisational structure
- Review of staffing structure for efficiency and affordability
- Evaluate performance management and appraisal systems and scrutinise any reward payments
- Staff disciplinary issues
- Premises management
- IT network management
- Reprographic and publishing services

Trust wide management

- Financial and administrative policies and procedures
- Planning, budgeting and reporting procedures
- Statutory compliance and risk management (health and safety, equality etc)
- Major procurement

Education

- Monitoring the implementation of the school improvement plans
- Individual monitoring of schools via key performance indicators
- Support for the professional development of staff

Policies

- Monitoring, establish and review policies and procedures, reflecting Advance Trust key criteria
- Provide feedback to Trust on the effectiveness of policies

Relationships and marketing

- Parent relations
- Admissions via Local Authority
- Community relationships (businesses, arts and sports organisations and partner schools)

How do we quality assure our work?

Advance Trust is ultimately accountable for the performance of each of its academies. It can agree to delegate as much or as little power down to the local governing bodies of the academies involved as is appropriate; this will vary according to the circumstances of each individual academy, with some requiring a higher level of centralised support based on their need as identified by the most recent Ofsted inspection, and/or financial management. Within Advance Trust a peer review system will provide guidance for each academy with information about performance and areas for development, this will be undertaken in annual review cycle unless an Ofsted inspection has occurred in the school during that academic year.

Self-Evaluation

Once per year, each of our schools will be subject to an Ofsted style review of its work. This will be carried out as a peer review process and involve members of the leadership group.

Progress towards agreed targets will be presented to the respective Governing Body of each academy on a regular (termly) basis and received by Advance Trust Board three times per year.

At a local level governors, from each of the academies within the Trust, will play an active role in monitoring the quality of learning and teaching against outcomes for learners. Tracking of progress will take place each term to enable governors to inform Trust Board of their findings in monitoring teaching and learning within their academy.

Through training across all of the academies within the Trust, governors will be supported to question and challenge information presented to them; gaining the level of awareness and understanding that will enable them to accurately judge capacity for further improvement. Our monitoring processes will inform self-evaluation and planning.

These will include:

- tracking of learner progress and planned interventions to support each learner's success
- analysis of attendance and punctuality (with a consistent strategy agreed across all of our academies to reduce persistent absence)
- analysis of data relating to learners' behaviour and safety
- scrutiny of learners' work
- analysis of standards of learning and teaching (including moderated lesson observations to ensure consistent judgements about standards across all of our schools).
- learning walks involving senior and middle leaders and governors
- evidence that professional development programmes are directly linked to the outcomes of lesson observations, school development plan targets and appraisal objectives
- detailed analysis of outcomes for learners
- consultation with students, staff and parents across our schools and partners across our wider community (this will be done through formally constituted groups, focus groups and surveys arranged throughout the year).

PESTLE Analysis

Political	<ul style="list-style-type: none"> • Government Education policy changes, new national funding formula, back log of conversions to EHC Plans • OFSTED requirements and possible change to regional schools commissioner role for school performance and accountability • Reduced Government focus on Education and denial of poor funding as focus shifts to Brexit • Changes in school syllabus • Assessment without levels - impact on wider moderation • Reduction of role of Local Authority
Economic	<ul style="list-style-type: none"> • Economic growth or contraction could affect the amount of funding the government gives to schools and specifically special schools • Economic growth or contraction will lead to an improved performance or worsening performance of the stock market and ultimately the pension fund deficit would increase or decrease accordingly • Pension deficit payment requirements are negatively impacting on available funding for each school • Economic growth or contraction is leading to a decrease in the number of funding avenues available and the amount of funding to the Academy Trust • Increase in inflation could lead to an increase in wages resulting in less funding available for pupils education • Increase in interest rates would mean additional income from deposits but adversely increase the cost of borrowing • reduction of available grant funding requires the development of an Advance Trust trading arm
Social	<ul style="list-style-type: none"> • Change in the age distribution may reduce the number of pupils, an ageing population would indicate fewer pupils • Changes in health care and the care for people with special needs may increase or decrease the need for special needs schools • Changes in welfare could increase or decrease the number of children with social behavioural issues requiring special school places • Changes to mainstream school curricula could impact on students being excluded or assessed for EHCP and may therefore impact on numbers seeking special school places. • Building new houses close to schools or in wider community will have an impact on number of school places required
Technological	<ul style="list-style-type: none"> • New technologies that can be used to improve pupil education and care • New technologies that can be used to reduce operating costs
Legal	<ul style="list-style-type: none"> • Health and safety laws impacting the way the school operates and associated costs • Employment laws influencing the way the school operates
Environmental	<ul style="list-style-type: none"> • Changes to legislation regarding condition of buildings (asbestos) • City locations restrictive premises, pollution, safety considerations • Rivers flooding resulting in school closures, restricted transport routes

S.W.O.T. Analysis

	Beneficial	Harmful
	Strengths	Weaknesses
Internal	<ul style="list-style-type: none"> *Vale of Evesham is a high performing school with Outstanding OFSTED report June 2016, Gold Investors in people Award, Gold Team Teach Award. *Riversides and Kingfisher 'Good' OFSTED report Autumn 2016 *The only special needs Trust in Worcestershire *The only provider meeting SEMH needs in Worcestershire *Running a consolidated surplus funding balance *Experienced business management team *Quality of teaching overall 'Good' with much judged 'Outstanding' *Innovative, responsive curriculum offers *Multi- disciplinary approach to meeting pupil needs 	<ul style="list-style-type: none"> *A number of new Headteacher/ Senior Leadership appointments in 2016-2017 and 2017-18 *Inadequate and unsafe facilities in some academies * Overspending current year's budget, eating into the surplus *Pension deficit using funding which could be spent on pupil education or equipment *Variable teaching standards in some schools with a historic over reliance on supply staff at Newbridge Short Stay School *Newbridge School in Special Measures *Recruitment of high calibre Governors and Directors
External	Opportunities	Threats
	<ul style="list-style-type: none"> *Ability to define Advance Trust's future *Ability to grow approaches that have most impact on all Trust pupils * Additional funding/grant routes, business development opportunities * Increase economies of scale by consolidating further academies into the Trust *Emerging Partnership with WCC evident in review of funding and use of buildings/ * Use the Education Standards and good practices within academies to aid improvement by sharing good practice. * Utilise the surplus funding to improve 	<ul style="list-style-type: none"> *Lack of coherence within organisation *Ineffective communication across Trust and within academies *Recruitment and retention of quality staff *Engagement of governors with appropriate skill set for developing each academy *Lack of knowledge of strengths and weaknesses within each school *Staff retention * Further changes in leadership * Lack of succession planning in each academy *Staff skill to meet student need not in place in some academies * Changes in Government legislation and funding models *Lack of planned CPD opportunities for individuals * Failure to link Trust planning to school planning. * Head Teachers reduced capacity to undertake work of the Trust set out in the Business Implementation Strategy

	individual/collective academy facilities *Ability to offer curriculum which is broad and balanced but meets needs of pupils *Ability to grow strong leadership across Trust *Ability to develop own staff which benefits academies within Advance Trust but also offers excellent career/PD opportunities for staff *Cost savings from joint collaboration/purchasing *Service provision to support Trust academies and mainstream schools *With improved national economic situation - Development of residential provision * With improved national economic situation - Expansion of Post 16 provision (16-19 SEMH) *Development of shared alternative curriculum facilities *Development of shared transport system	
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Strategic Operations

Executive Leadership Team - Formed from all staff who work at Headteacher level within each school along with the Executive Principal, Business Director, (and a senior member of support staff/ Therapist by invitation as needed). The purpose of this group is to advise the Trust Board on strategy and the implementation of that agreed strategy. This group has an operational overview.

Heads Group - Membership consists of head teachers and Executive Principal. Purpose of the group is to ensure leadership strategy is consistent within the Trust

Business Group - Membership consists of Business Director, Management Accountant, all Business Managers & Office Managers who work within the Trust. Purpose of the group is to ensure consistent business and finance strategy and operation within the Trust.

Others Groups – it is envisaged that other working groups will be formed in order to take the action plans forward e.g. Safeguarding, Careers Development, Funding Allocation, Risk and Audit and a Teaching and Learning focus.

No groups should meet without a clear agenda and purpose. If there is no clear function for a group then it should be collapsed.

Recruitment and Growth Strategy

The Trust aims to recruit staff at all levels that are highly trained and motivated. Advance Trust will strive to offer career opportunities to staff within the Trust. The Trust will offer relevant professional development opportunities to all staff as a result of being identified through the performance management and appraisal process.

In house training will be offered to staff at all levels through a coaching and mentoring approach but particularly at middle leadership level.

More formal training will also be offered at Leadership level and there is an expectation that staff will access external courses as well such as NPQH, NPQSL and NPQML.

Training will be offered routinely to meet the needs of the School Development Plan in all schools for all staff.

The School Direct Programme will be available for staff application each year along with opportunities to undertake the Assessment Only route for school based teacher training.

There is an expectation that staff, other than classroom based staff, will also undergo regular training. This includes members of each of the Local Governing Bodies.

Opportunities will be developed for staff to work in other schools within the Trust.

Risk Management

Comprehensive risk analysis utilising web based software, GRC1 (Governance, Risk Management and Compliance) online for school governance.

Snapshot of major risks indicators:

R1 The academy premises are unavailable for occupation for a significant period of time

R2 The academy suffers from a significant or prolonged governance failure

R3 There are insufficient staff or resources to deliver services to the appropriate level

R4 The senior leadership team are unable to deliver the academy's Business Implementation Strategy

R5 There are insufficient funds to deliver the services to the appropriate level

R6 The academic achievement of pupils at the academy falls below acceptable standards

R7 The quality of teaching at the academy falls below acceptable standards

R8 The leadership in, and management of, the academy falls below acceptable standards

R9 The behaviour and safety of pupils, staff or visitors falls below acceptable standards

ADVANCE TRUST
(A Company Limited by Guarantee)
REGISTERED NUMBER: 08414933

BALANCE SHEET
AS AT 31 AUGUST 2017

	Note	£000	2017 £000	£000	2016 £000
Fixed assets					
Tangible assets	16		16,371		16,281
Current assets					
Stocks	17	1		2	
Debtors	18	215		309	
Cash at bank and in hand		1,364		1,205	
		<u>1,580</u>		<u>1,516</u>	
Creditors: amounts falling due within one year	19	(363)		(418)	
Net current assets			<u>1,217</u>		<u>1,098</u>
Total assets less current liabilities			<u>17,588</u>		<u>17,379</u>
Creditors: amounts falling due after more than one year	20		(2)		(2)
Net assets excluding pension scheme liabilities			<u>17,586</u>		<u>17,377</u>
Defined benefit pension scheme liability	25		(6,278)		(5,545)
Net assets including pension scheme liabilities			<u><u>11,308</u></u>		<u><u>11,832</u></u>
Funds of the academy					
Restricted income funds:					
Restricted income funds	21	852		730	
Restricted fixed assets fund	21	16,371		16,280	
Restricted income funds excluding pension liability		<u>17,223</u>		<u>17,010</u>	
Pension reserve		(6,278)		(5,545)	
Total restricted income funds			<u>10,945</u>		<u>11,465</u>
Unrestricted income funds	21		<u>363</u>		<u>367</u>
Total funds			<u><u>11,308</u></u>		<u><u>11,832</u></u>



Advance Trust, a Charity and Company limited by guarantee, registered in England and Wales Company number 08414933 whose registered office is at Vale of Evesham School, Four Pools Lane, Evesham, Worcs, WR11 1BN (01386) 442753 email enquires@advancetrust.org Executive Principal: Liz Hayward