



**BERLESDUNA**  
ACADEMY TRUST

## **Corporate Business and Strategic Plan 2016 - 2019**

*fostering a culture of high aspiration*

## Introduction

I am very pleased to introduce the first Berlesduna Academy Trust Corporate Business and Strategic Plan covering the period 2016 – 2019. This plan sets out the 3 year strategic objectives including the priorities for 2016 – 2019.

The Board of BAT is determined to see a high performing Academy Trust that delivers the very best educational experience for pupils at both primary and secondary level. The changing educational landscape continues at a fast pace with more schools converting to academies. This document sets out how we will plan, guide support and improve the schools within the BAT (and also schools that are yet to join) across the geographical area within which we operate, ensuring there is a clear focus to improving leadership and governance, teaching and learning and raising standards.

We have a cost effective organisation and a business model that delivers efficiency, effectiveness and economies of scale in order to free up more resources for the front line.

I am extremely grateful for a strong Board of Directors who provide the effective support and challenge that is required to ensure that the BAT is an effective employer and provides each school within the Trust with the leadership and track record to succeed.

It is often said that children get one opportunity for a good education. The role of the Trust is to ensure that the Trust provides the highest standards to enable this.

**Sean Tobin**  
Chief Executive

## Vision Statement

The vision of the Berlesduna Academy Trust is to create and foster a culture of high aspiration, enjoyment for learning, academic success and lifelong skills amongst all pupils, regardless of their social, economic or cultural background.

## Aims and Values

The aim is to become a strong local partnership of schools. Whilst we aim to build a strong and cohesive identity, we recognise that each school within the Trust has its own unique characteristics. Collaboration and joint working ensure that all schools within the Trust can share in, and benefit from, each other's strengths. The aim as an Academy Trust is to work together to:

- make a positive difference to the lives of the pupils
- have an unflinching commitment to closing the gap between high and low performers within the schools
- transform the learning conditions of others so that growth, commitment, engagement, and constant spawning of leadership in others is being fostered

## Governance

### Founding members of the Trust

They have ultimate responsibility for the Trust achieving its charitable objectives. They sign off the Articles of Association and have power to appoint and remove the Trustees. They have ultimate control over the direction of the Academy Trust.

### Directors Board – including Chief Executive Officer

The Board is responsible for setting high standards and levels of student achievement and for monitoring performance and ensuring accountability. It is tasked with driving continuous improvement through regular review planning and evaluation activities. It also manages corporate communication and stakeholder engagement. Once strategies have been agreed, the Board delegates most operational activity to the Executive Leadership Team. There are also Trust standing committees which have duties to support the Board with these responsibilities, to focus on the delivery of the vision against the Trust standards and engage with stakeholders internally and externally to ensure that the needs are being met.

### Finance, Personnel, Premises and Audit Committee

The core function of the committee covers all financial services and other resources including human resources and facilities. It has a critical role in overseeing budget formulation, monitoring, and treasury management. The financial functions extend into value for money and procurement and covers all matters relating to human resources including staff related performance management/review, disciplinary, under-performance and capability issues,

continuing professional development, attendance, welfare and quality of work-life. The committee also receives and considers in detail the statutory accounts for the Trust and recommends them to the Board of Directors for approval prior to presentation to the Trust Members. It recommends the appointment of the external auditors to the Board of Directors for subsequent approval by the Trust Members. It also has a wider brief covering asset management, facilities management, lettings, information technology, and health and safety.

### **Local Governing Body**

The Board also has established committees known as 'local governing bodies' for each school within the Trust. Their role is to oversee all matters relating to pupils' learning and well-being. The core function of a local governing body covers all factors which relate to, and underpin, good teaching and learning. It has a critical role in monitoring the progress and impact of personalised learning interventions to ensure high standards and pupil outcomes in line with the Trusts vision and strategy. Each of the schools within the Trust has a maximum of eleven governing body members, comprising:

- Headteacher/Head of School
- 2 staff governors
- at least 2 co-opted/community governors
- at least 2 parent governors

### **Trust Executive Leadership Team**

The Executive Leadership Team has corporate responsibility for the overall formulation and implementation of strategies and policies approved by the Directors. It comprises the Chief Executive Officer, Head of Finance and Operations and the Headteacher/Head of School from each school.

### **Chief Executive Officer (CEO)**

The role of the CEO is to support the substantive Headteacher/Head of School in their role and to assist in the development of staff across the schools and identify ways in which the Trust can facilitate, provide and develop school improvement. The CEO is responsible for the day to day operation of the Trust and is accountable to the Directors. The CEO will lead the strategic and operational development of the Teaching School Alliance and work alongside the NQT leads of each school within the Trust.

### **Head of Finance and Operations**

The Head of Finance and Operations will report directly to the CEO of the Academy Trust. They will be part of the Senior Leadership Team at Trust level and will be expected to work in collaboration with senior leaders across the Trust. The core purpose of the role is to strategically lead and manage the business innovation and financial aspects of the schools and will play a significant role in meeting the needs of other schools that may consider joining the Trust in the future.

### **Leadership in Schools**

Each school within the Trust will have its own structure of leadership depending on its own particular circumstance and context.

### **The Trust Pupil Voice**

The Trust Pupil Voice gives pupils the opportunity to share their views with both the Trust and the schools. Made up of two selected pupils from each school, the Pupil Voice follow a self-developed Pupil Voice Charter, which forms their ethos and structure which themselves and future ambassadors will work by. The ambassadors will represent their school and allow the pupils to share their views with the Trust which will give them the opportunity to work together with pupils from each school. The purpose of the Trust Pupil Voice is:

- to represent pupils' views from each school
- to reach out to and work with, the schools, the Trust and beyond
- to make one small idea part of one big decision for everyone and improve all of the schools within the Trust
- to see everyone as equal and be democratic
- to form an established pupil voice in each school, under The Trust

The Trust Pupil Voice meets half termly and will be joined by the Chief Executive Officer of the Trust.

### **Finance**

The Trust will collect a maximum proportion (a 5% top-slice) of general annual grant (GAG) funding from each school to form one central fund. Only the schools GAG funding will be top-sliced. Funding for pupil premium, special educational needs (SEN) provision and other income generated by individual schools will not be top-sliced. We will tender for the group rather than for individual schools and this will achieve economies of scale.

### **Autonomy**

The ethos of the Trust Board is that best results will be achieved when each schools Local Governing Body receives a level of responsibility and autonomy appropriate to its specific circumstances. When a school is graded as 'Good' or 'Outstanding', the level of support through day-to-day supervision by the Trust will be limited to those areas of agreed need and improvement. It would be expected that the LGB will operate with maximum autonomy applied through the Trusts scheme of Local Governing Body delegation. It will be a requirement that schools graded in a category will be subject to close supervision of all aspects of governance, leadership, financial management and curriculum delivery through the CEO and Trust Head of Finance. The LGB will have restricted delegated powers. It would be normal practice for members to be appointed by the Trust Board.

### School Improvement Strategy

The aim is to support each school to be judged by Ofsted as at least 'Good' with the capacity to become 'Outstanding'. Once per year, each school will have a Peer Review organised by the Basildon Excellence Partnership (BEP) involving the CEO and the BEP School Improvement Partner. Formal reviews of each schools' progress towards agreed targets are presented to the respective Local Governing Body of each school on a regular (termly) basis and received by the Directors Board at least three times per year. At a local level, governors from each school within the Trust will play an active role in monitoring the quality of learning and teaching and outcomes for learners. Through regular training across each school 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 the schools' capacity for further improvement. The monitoring process will continuously inform self-evaluation and planning within each schools.

These will include:

- tracking of learner progress and planned interventions to support each learners' success
- analysis of attendance and punctuality (with a consistent strategy agreed across all of the schools 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 the schools)
- learning walks involving senior and middle leaders and governors
- evidence that professional development programmes are directly linked to the outcomes of lesson observations and appraisal objectives
- detailed analysis of outcomes for learners
- consultation with pupils, staff and parents across the schools and partners across the wider community (this will be done through formally constituted groups, focus groups and surveys arranged throughout the year)

An integrated approach will be undertaken alongside the Academy, taking full account of their own self-evaluation and identified priorities. We will also establish the areas of strength and expertise that can be shared across the Trust.

## Trust Key Performance Indicators 2016 - 2019

### Governance KPIs

1. All Members and Trustees fully understand their duties as company directors and charity trustees as laid out in the Companies Act 2006 and Charity Commission guidance as exemplified in a skills audit.
2. All schools have a full complement for their Local Governing Bodies, with an appropriate set of skills and experiences to undertake their defined responsibilities.
3. Leadership and management will be graded as outstanding in all schools within 2 years of joining the trust, or at the first section 5 inspection, whichever is soonest.

### Financial KPIs

1. Ensure economy, efficiency and effectiveness over the use of Trust funds (value for money).
2. Zero red flags in annual audited accounts.
3. Accounts filed with Companies house for public access and on the Trust website by 31 January of the following year
4. Trust to submit audited financial statements, auditor's management letter and accounts submission coversheet by 31 December to ESFA.
5. All statutory returns submitted on time.
6. Staffing percentage as a total budget (taking into account EHCP and SEN numbers) is no more than 82%.

### Human Resources KPIs

1. Staff attendance at least 95% in all schools (contextualised to allow for any unavoidable absence due to long term sickness or accident.)
2. 80% of recently qualified teachers will be retained.
3. 80% of outstanding teachers will be retained.
4. Pupil to teacher ratios are favourable compared to national levels.
5. Development opportunities made available to staff to work across schools in the MAT.

### School Standards KPIs

1. All MAT schools retain or improve their Ofsted inspection rating.
2. Parent, staff and pupil survey data illustrates satisfaction.
3. All schools are fully compliant with health and safety, safeguarding and other statutory requirements.
4. All schools are either at full capacity or are increasing their capacity.
5. Progress indicators substantially exceed national averages for all groups in all schools indicating quality of provision, including 100% pupils make at least expected progress at end of KS2 in reading, writing, Mathematics
6. The percentage of teaching across the MAT that is good or outstanding is at least 90%.
7. School attendance data higher than national average (contextualised) for all schools within 2 years of joining the Trust.

### Trust Objectives 2016 - 2019

The Academy Trust has clear strategic aims built on the mission and values. The three year corporate business plan sets out the following objectives to ensure that, as a Trust, all stakeholder groups understand and have belief in the approach. We will deliver:

#### **Corporate Governance:**

This will be done through the provision of a Board of Directors that acts in the best interest of the Trust and governs lawfully in accordance with its Articles of Association. The Directors will demonstrate clear governance arrangements and visionary leadership to enhance and embed effective working relationships. The Board will ensure there are effective support structures in place to deliver a clear oversight of the academy operations, appropriate support structures for sustainability and achieve the best possible economies.

#### **School Improvement - Teaching and Learning:**

This will be delivered through ensuring that each school within the Trust provides the very best teaching in order to promote and provide high quality learning for the pupils. The Trust will put effective support in place for teachers to achieve this aim.

#### **Continued Professional Development:**

We will implement a CPD programme for each school to ensure that the staff have the right skills to further raise standards, deliver consistently good teaching and learning and disseminate good practice to ensure rapid improvement.

#### **Quality Assurance:**

We will ensure that there is a rigorous and robust programme of Quality Assurance that helps to support teachers, build expertise and capacity and raise standards in each school to deliver positive outcomes for pupils.

#### **Integrated Support and Shared Services:**

We will ensure that the Trust has business arrangements that are efficient, effective and enables it to deliver on its commitments. We will include strategies to grow, prosper and deliver value for money across all operations. We will strive to ensure the consistent delivery of best practice, minimisation of risk and also for management of resources to be concentrated to the front line of each school.

### Objectives 2018-19

The journey to deliver against the 3 year corporate objectives for the 2018 -19 focus (using the MDIF) is based on the following:

- build Trust capacity to ensure effective school improvement

To deliver school improvement in each school joining the Trust and focussing on:

- closing the attainment gap for disadvantaged pupils (maths)
- spelling at KS1 and KS2
- skills of learning
- Maths reasoning to increase greater depth and ensure progress of the most able
- Year 3 – the continued progress from KS1
- deliver school improvement in schools joining the Trust (supporting those joining that are underperforming)

### Developing Trust Central Operations

A key strategy is to promote and develop the Trust and also the services we offer to a wider cohort of schools. This means that each school can focus on improving teaching and learning along with delivering educational excellence. We will work across a range of partnerships, including a small core central team and include professional partners to share good practice and jointly procure services to bring about better value for money and economies of scale. Our approach will be to:

- identify the key services required by schools joining the Trust and develop clear specifications for commissioning such services
- develop a prospectus detailing a range of approved and trusted providers and services to support the schools
- work closely with relevant partners, including Essex and BEP, to understand the range of strategies which they can utilise to support the schools but continue to develop clear Trust services
- develop and document the offer and entry criteria to each type of school likely to consider joining the Trust

Subject	Merrylands 2018	The Willows 2018	Whitmore 2018	Crays Hill 2018
EYFS GLD	77%	75%	68%	0%
Year 1 Phonics - Pass	83%	80%	85%	25%
Year 2 All pupil achieving the phonics standards	92%	96%	86%	33%
Year 2 Reading – at least expected standard	82%	71%	73%	20%
Year 2 Writing – at least expected standard	75%	68%	64%	7%
Year 2 Maths – at least expected standard	80%	73%	71%	7%
Year 2 Science – at least expected standard	85%	84 %	65%	0%
Year 6 Reading – at least expected standard	79%	90%	69%	13%
Year 6 Writing – at least expected standard	84%	90%	72%	0%
Year 6 Maths – at least expected standard	80%	93%	76%	0%
Year 6 Science – at least expected standard	89%	90%	81%	0%
Year 6 Combined Reading, Writing and Maths – at least expected standard	68%	82%	64%	0%
Year 6 Grammar, Punctuation, Spelling – at least expected standard	85%	95%	67%	0%

**School Targets 2018-19**

Subject	Merrylands	Willows	Whitmore	Crays Hill	Felmore
	2018	2018	2018	2018	2018
EYFS GLD	80%	70%	70%	n/a	80%
<b>Year 1</b>					
Year 1 Phonics – pass	85%	82%	90%	n/a	80%
<b>Year 2</b>					
Year 2 Reading – at least expected standard	83%	72%	75%	n/a	70%
Year 2 Writing – at least expected standard	80%	71%	65%	n/a	70%
Year 2 Maths – at least expected standard	83%	75%	75%	n/a	75%
Year 2 Science – at least expected standard	87%	76%	70%	n/a	80%
<b>Year 6</b>					
Year 6 Reading – at least expected standard	86%	86%	72%	n/a	74%
Year 6 Writing TA – at least expected standard	86%	86%	72%	n/a	76%
Year 6 Maths – at least expected standard	85%	85%	78%	n/a	78%
<b>Year 6 Combined</b>					
Year 6 Combined Reading, Writing and Maths – at least expected standard	80%	83%	68%	n/a	70%
<b>Year 6 Grammar, Punctuation, Spelling</b>					
Year 6 Grammar, Punctuation, Spelling – at least expected standard	86%	90%	72%	n/a	80%

Trust Priorities 2018-19

Priority One 2018-19	What we will do	Lead	Timescale	What will success look like	Which 3 year objective will this meet
Build Trust capacity to ensure effective school improvement.	<p>Support for succession planning across all schools including talent identification, coaching and mentoring.</p> <p>Coaching and support of leaders and managers to enable them to effectively assess and improve the quality of teaching and learning.</p> <p>Help and advice for leaders and managers in implementing effective pupil progress tracking systems and analysis of outcomes to drive progress and attainment.</p> <p>Modelling of outstanding subject leadership and support and challenge to middle leaders which impacts on the leadership of their curriculum area.</p> <p>Development and delivery of training and coaching to support the continuous professional development of leaders and managers so that they are able to carry out their responsibilities effectively.</p> <p>Support for improvement planning and preparation for OFSTED/HMI.</p>	CEO and Head of Finance	April 2018 to July 2019	<p>Each school will be judged 'Good' or 'Outstanding by both Ofsted and BEP by July 2019.</p> <p>All teaching within each school will be good or better.</p> <p>Progress and attainment in each school will not only exceed floor targets but will be comparable with the very best for pupil progress and outcomes.</p> <p>The schools will be able to accurately self-evaluate and will have a culture of continued improvement and high aspiration.</p> <p>The schools will demonstrate good leadership, including governance and this inspirational leadership will be shared across each school.</p> <p>High quality professional development of staff will mean that the schools will attract and retain the very best teachers.</p> <p>Growing our own leaders will ensure sustainability in our schools.</p>	<p>school improvement</p> <p>teaching and learning</p> <p>continued professional development</p> <p>corporate governance</p>

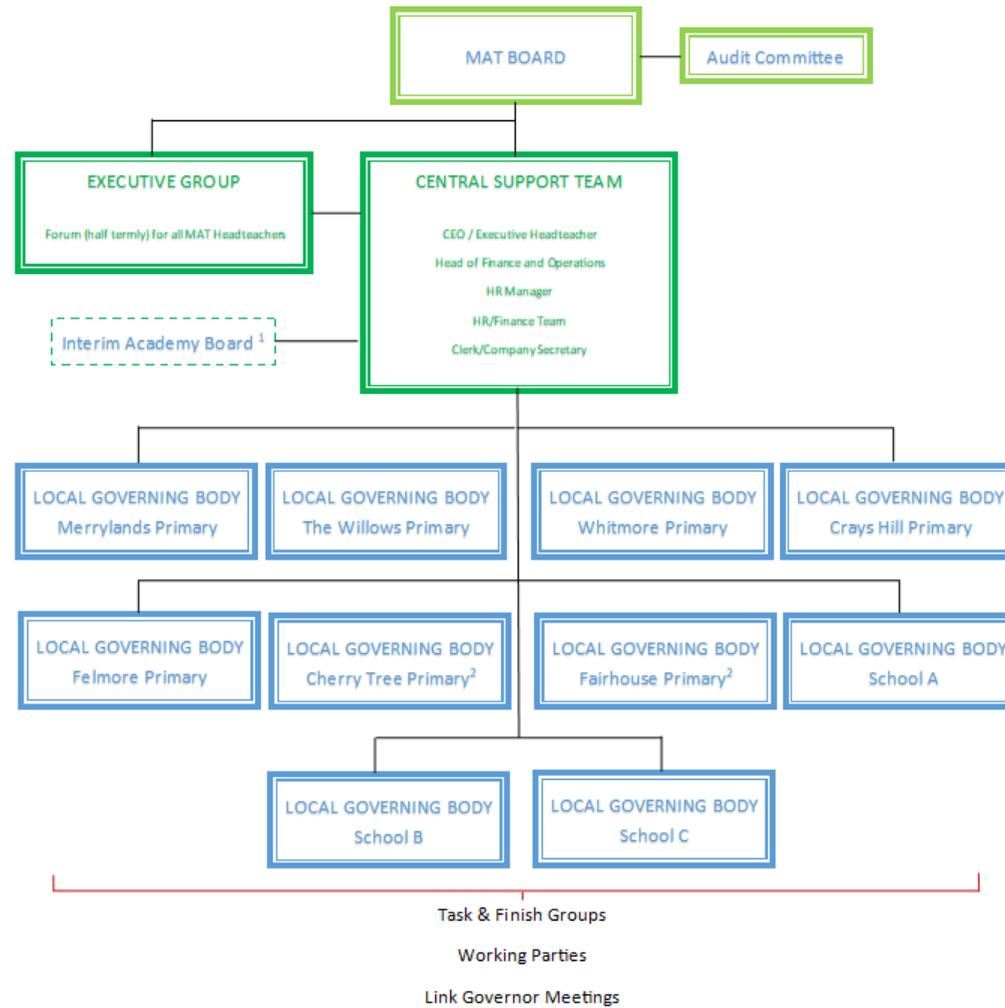
	<p>Coaching and support for the Trusts' new Head of Finance and Operations Manager.</p> <p>Coaching and support for the Trusts HR team.</p> <p>To continue to work with the Basildon Education Partnership.</p> <p>Support and training for the school and Trust Governors.</p>				
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Priority Two 2018-19	What we will do	Lead	Timescale	What will success look like	Which 3 year objective will this meet
<p>Deliver school improvement in schools joining the Trust focussing on:</p> <p>Closing the attainment gap for disadvantaged pupils (maths).</p> <p>Spelling at KS1 and KS2.</p> <p>Skills for learning Maths reasoning to increase greater depth and ensure progress of the most able.</p>	<p>Methods for collaborating within the partnership included leadership or working group meetings, visits to observe and share practice, centralised training, resource exchange and workshops.</p> <p>Additional funding would be used to enhance, support and strengthen these strategies in existing schools and implementation in joining schools.</p> <p>MDIF Funded CPD sessions during the academic year.</p> <p>Trust CPD and Network twilight sessions</p> <p>BEP network meetings.</p> <p>Online training packages for all staff.</p>	CEO	April 2018 to July 2019	<p>All schools will be judged 'Good' or 'Outstanding' at their next Section 5 Inspection.</p> <p>All teaching within the schools will be good or better.</p> <p>Progress and attainment in each school will not only exceed floor targets but will be comparable with the very best for pupil progress and outcomes.</p> <p>Each school will be able to accurately self-evaluate and will have a culture of continued improvement and high aspiration.</p> <p>Improvements in performance across the curriculum or in specific areas of learning.</p> <p>Affective benefits (e.g., improved attitudes, motivation, enjoyment, engagement, self-esteem, aspirations and relationships).</p> <p>Development of transferable skills and greater independence in learning.</p>	<p>school Improvement</p> <p>teaching and learning</p> <p>continued professional development</p> <p>corporate governance</p>

Year 3 the progress from KS1.					
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Priority Three 2018-19	What we will do	Lead	Timescale	What will success look like	Which 3 year objective will this meet
<p>Deliver school improvement in schools joining the Trust (supporting those joining that are underperforming).</p>	<p>Ensure effective self-evaluation, development planning and monitoring.</p> <p>Ensure that statutory processes are followed, governing body and school structures are conducive to effective leadership and management and the balance of responsibilities is right.</p> <p>Support and advice for leaders and managers in brokering partnerships, collaborations, alliances, clusters and other forms of school to school support.</p> <p>Support and mediation where relationships require further development.</p> <p>Identification and sharing of effective strategies for closing gaps in the progress and achievement of</p>	CEO	April 2018 to July 2019	<p>Creation of a 'virtual' circle for staff development in the schools; graduates are linked with the schools, our involvement in training (Merrylands Teaching Training Partnership) giving the Trust first choice on the very best.</p> <p>Low staff turnover and ability to recruit quality teachers.</p> <p>All schools will be judged 'Good' or 'Outstanding by both Ofsted and BEP by July 2018.</p> <p>All teaching within each school will be good or better.</p> <p>Progress and attainment in each school will not only exceed floor targets but will be comparable with the very best for pupil progress and outcomes.</p>	<p>school improvement</p> <p>teaching and learning</p> <p>continued professional development</p> <p>corporate governance</p>

	<p>vulnerable learners, including those with Special Educational Needs, those eligible for Pupil Premium and Looked After Children.</p> <p>Support for improving the quality of moderation processes at all key stages support for Crays Hill and Felmore transitioning to join the Trust and another local school in discussions.</p> <p>Effective deployment of Trust Lead Practitioners and utilising their skills to deliver CPD across the Trust.</p> <p>Use of BEP School Improvement Partners.</p>				
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<sup>1</sup>Structures established for schools requiring governance outside LGB structure (responsible directly to MAT Board).

<sup>2</sup>Schools joining in April 2019