

The Ivy Academy – briefing paper

Background

In order to best meet the challenges facing schools today, the governing bodies of Lavender and Brimsdown, both separately and together, have looked into a number of options. These included forming a federation, staying as we are, joining a large MAT or setting up our own MAT. Working parties in each school were established and SWOT analysis was undertaken to best understand each option. As part of an information gathering exercise to best support this process, both governing bodies, in a number of meetings, met to hear from representatives of existing MATs, local authorities and federations.

This final briefing paper has been drawn up as a result of this process. It is the preferred option recommended by the joint working party and has been considered and voted on by both governing bodies.

Core purpose

To improve the life chances of our children.

Individual schools' vision statements:

We believe that all children have the right to the very best education. Our core values of respect, care, honesty, responsibility, appreciation and determination underpin everything we do. We are committed to helping children to become lifelong learners, to be reflective and resilient and to have a passion for new knowledge and skills. As a community school, we continually strive for excellence in all areas: learning from, and supporting, other schools.

(Lavender)

We aim to produce responsible, caring, respectful and aspirational young people of whom we can all be proud.

(Brimsgate)

Vision – themes and principles

Themes

1. Community

We believe in excellent local schools for local children rooted within their communities. Whilst collaboration will be at the heart of our values, importantly, each school will retain its autonomy, unique character and ethos.

2. Inclusion

We are committed to ensuring that children who have special educational needs and disabilities will continue to get the very best provision and a fully inclusive education.

3. Excellence in Leadership

We will build upon our excellent and extensive leadership training: ensuring retention of staff through succession planning and outstanding CPD opportunities.

Principles

We believe that it is essential that our schools:

1. put the needs of every child at the centre of curriculum and policy design;
2. ensure that the safety and well-being of our children is never compromised;
3. embed pupil voice meaning that the curriculum is engaging, relevant and meaningful;
4. teach everyone how to be a good learner, understanding how to achieve;
5. use self-assessment, peer feedback, and teacher-pupil dialogue to ensure progress;
6. make sure that everyone understands their responsibility for ensuring that all, including the most vulnerable, can succeed;
7. incorporate and communicate values that underpin behaviour, relationships and learning so that everyone feels safe, respected and cared for;
8. exhibit a true 'Growth Mind-set' culture where everyone understands that effort is key to success;
9. ensure that innovation and professional development drive teaching practice and standards;
10. value staff as professionals, ensure expertise is shared and ensure workload is not allowed to become excessive;
11. listen to, work with and have pride in their community, ensuring the very best for all; and
12. ensure that everyone respects the physical environment.

Why set up the Ivy Academy Trust?

We believe that setting up a MAT would improve the life chances of our children and ensure improved financial efficiency for these reasons:

Pushes

1. Reduced LA support going forward: Enfield local authority are making substantial cuts now and in the next few years and will have to prioritise which services to cut.
2. Financial realities: school budgets have remained at a 'standstill' for the last two years, at a time when contributions to pensions, superannuation and national insurance have gone up for employers. This has amounted to a significant real terms cut in our budget and we have to find efficiency savings. We are fortunate in that currently both schools are financially stable but there is no doubt that no longer having to lose a proportion of our funding to the local authority through the top slice would greatly improve the situation. At current rates, we would receive an additional £77 per pupil through this route, of which a small proportion would be used to buy back some local authority services. Through careful analysis, the governors estimate that the MAT would be financially better off. In addition, extra funding of up to £100k may be available for schools in our position.
3. Political pressure: the DfE's ongoing agenda to encourage all schools to convert into academies.

Pulls

1. Opportunity for more autonomy: the chance to decide our own destiny and future.
2. Recruitment of teachers: through using innovative recruitment strategies and offering outstanding CPD opportunities including giving leaders the ability to point to realistic career development paths and opportunities to specialise within the MAT, we can employ and retain the very best teachers for our children. From this, we can produce a pipeline of great future leaders and governors – at all levels – to support and develop teaching and learning across our schools.
3. Further collaboration: to formalise the mutually beneficial relationship between our schools. This will enable governors and leaders to come together and take the responsibility to provide better education in our community, rather than just in our individual schools, supported by a common ethos. It will also facilitate the sharing of effective practice between the schools, so that when a particular

approach has been shown to work, improving teaching and learning, it can be implemented across the MAT.

4. More financial control: the opportunity to make savings by choosing the exact services we need for our children offering greater value for money. Having centralised financial systems enables the trust to have effective oversight and control of finances and helps promote a 'value for money' culture.
5. Efficiency savings: from pooling resources within a central team, enabling cost efficient commissioning and purchasing of goods and services through a single supplier at a reduced rate and/ or facilitating the development of in-house services for our schools. This advantage would increase in the future if more schools were to join.
6. Future capital money: Academies benefit significantly from the Condition Improvement Fund which helps with capital works or refurbishment. Academies can apply for funding for up to two capital projects each year.
7. There is scope to generate additional income from commercial activities across the MAT. The additional flexibility and agility implicit in the new structure would allow us to respond quickly to such opportunities.

Governance

The governance of the trust will be comprised of members and a board of trustees who will act to ensure the core purpose of the trust is adhered to at all times. These will all be unpaid roles.

- There will be no less than three and no more than five founding members who will be responsible for the future appointment of the trustees and the replacement of founding members as necessary. They will meet once a year.
- There will be no less than five and no more than nine trustees who will have specific expertise in Teaching & Learning and Finance as well as in other areas. Trustees will not be paid and will meet at least once a term.
- Initially, there will be a representative from each school on the trustee board. These representatives, once elected to the board, will always act in the best interests of all the children in the MAT. The trustee board will have two committees – Teaching & Learning and Resources.
- In the first instance, they will meet to ensure that a smooth conversion occurs. The founding members and members of the interim board will be selected by Matthew Kleiner-Mann, Sam Buckley (Chair of Governors at Lavender) and Ingrid Cranfield (Chair of Governors at Brimsdown).
- Individual schools will have their own governing body. They will have delegated responsibilities to oversee the good running of their schools. Parents will be represented on each individual school's governing body.
- The current Executive Headteacher will be a trustee. He will have a dual role as Executive Headteacher and CEO of the Trust.
- The current Associate Headteachers will attend committee meetings of the trust board in the capacity of associate trustees as well as being full members of their individual schools' governing bodies. Within the MAT, each will also have the dual role of Associate Headteacher and Director of Teaching and Learning.
- A central team covering finance, HR and premises will be set up to ensure efficiency savings. This team will be comprised of existing business managers.

Risks considered and actions taken?

1. The schools' individual uniqueness will be lost: each school will have its individual local governing body who will decide the teaching and learning strategies. These bodies will ensure the values and identities of the schools will prevail.
2. Non-teaching staff pensions deficit: after consultation with the Local Authority, the MAT will not have to pay lump sum deficit payments but instead will continue to pay the LA's pooled employer contribution rate.
3. On-going capital projects: the LA is part funding a large capital project at Brimsdown. We have guarantees that this commitment will be honoured.
4. Nursery: since Lavender Nursery is located within the grounds of a local authority maintained school, we would need to legally secure this arrangement.
5. Deficit budgets: we need to ensure that each school's three year budget is not in deficit. Each school is currently working within budget.
6. Service Level Agreement costs: the time frame for conversion needs to be carefully managed to ensure that we do not pay twice for services (e.g. insurance). The local authority has agreed that the majority of traded services will remain the same for academies and community schools.
7. Limited resources: time taken to manage the conversion could impact upon the smooth running of the school. We need to ensure we have the capacity to manage the conversion.
8. Future staffing: We believe that staffing opportunities for career development across the MAT would be enhanced by the formalisation of the relationship between the schools.