

JTMAT Strategic Plan

2021 - 2024



Developing provision, improving learning and achieving greater outcomes- within and across our schools



Updated September 2021



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Introduction:

This is the third, three-year Strategic Plan for the development of John Taylor Multi-Academy Trust and its community of schools. Constructing this plan during a time in which the Covid-19 global pandemic continues to affect us all may generate one of two competing criticisms: The first is that the plan focuses on our current position and recovery from it, but pays insufficient heed to the medium term and the “new normal” state to which we should aim for by the end of August 2024. The second is that we remove ourselves from the realities of the current crisis and its impact on our children, our families, our schools and our system and instead focus too much on the horizon without seeing what lies beneath our noses.

This plan leaves its authors primarily exposed to the latter criticism. However, in anticipation of such, it is important to state via this introduction the following:

- 1) Our fourteen schools, their leaders, their staff, governing bodies, children and families have been resilient throughout. Engagement in, and the continuity of, learning has been admirable – and our schools have been highly responsive to issues where they have arisen.
- 2) Our schools have been impacted to differing degrees, and in different ways. A strategic plan may inevitably fail to address context-specific matters appropriately – or at all.
- 3) There is catch-up funding for schools and interventions planned (e.g. summer schools, national tutoring programme) will be developed, articulated, and reported by schools independently of the Trust’s plan, but where the community of schools will collaborate to deliver the best provision it can.

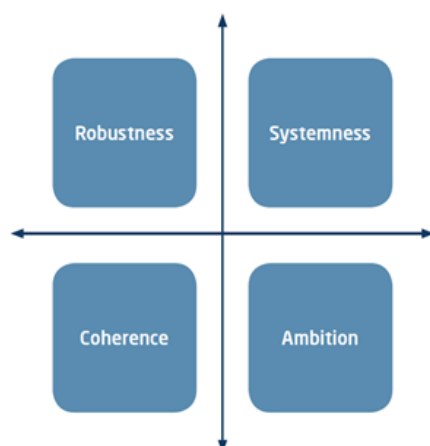
Where this plan will give recognition to the current situation is in the legacy Covid-19 will have upon our schools and our learning. Remote and online learning have become much more sophisticated and effective, children and adults have become more self-managing and independent as learners, and the social and societal roles played by schools, noted most acutely by those who have been absent from them, has been accentuated. What the absolute and final legacy to learning and to our schools will be is hard at this stage to ascertain. Here, there may be an argument for deferring the construction of a new strategic plan. To counter, we would remind readers of the caveats that we always place in our preambles: that a plan is an intention, not a promise. We reserve the right to add, amend, delete and defer strategies and activities as circumstances suggest appropriate. We should also appreciate that the legacy may extend into many years – particularly a financial legacy to school funding – and that our mantra throughout the pandemic, to “do the best you can, for who you have, with what you’ve got” may remain relevant for some time to come.

Finally, it is important for our sense of purpose and our wellbeing that we look toward a better future. The Trust team and school leaders have engaged in the construction of this plan with positivity and enthusiasm. The objectives, activities and milestones outlined herein are an expression of our continued resolve to improve our provision and for us to grow, firm in our belief in the power of education to improve lives – and the world.

Context:

This plan is framed in our current context – locally, regionally and nationally – and the strategies and activities contained herein have been constructed accordingly. There are naturally a range of internal and external drivers for change. In terms of external sources of influence, the Confederation of School Trusts’ documents, proposals and seminars have helped shape our thinking. Specifically, their “Bridge

to the Future” white paper has articulated four themes that will hopefully resonate when one reads our plans – robustness; systemness; coherence; ambition:



Our planning, in the same way as that CST argues needs to be the case with national policy, aims to exhibit the following attributes. Our planning is sufficiently robust to be resilient in the face of turbulence, internally or across the sector. We recognise and acknowledge the wider system within which we operate, which includes our distinctly outward-facing work hosting both a Teaching School Hub and a Research School and the broader political and socio-economic systems beyond the education sector itself. We strive for coherence, in that the sum of the plan’s parts creates a clear picture through which all our communities and stakeholders can see our intention, our proposed implementations, and the intended impact of our work. Finally, our plans demonstrate ambition for our children, our staff, our schools, our communities and the Trust itself. Our previous strategic plans saw us achieve much, but not everything – and we envisage the same outcome from this plan also. As a page in a child’s book full of “ticks” suggests a lack of challenge, so does a plan where each and every aspect is completed to a satisfactory outcome.

Highlights:

The three-year duration of the previous Strategic Plan (2018-21) saw the following key achievements:

- The Trust has seen growth in both primary and secondary phases, with four primary schools joining the Trust (Needwood CE Primary, All Saints’ Rangemore CE Primary, Walton on Trent CE Primary and Church Gresley Infant and Nursery School), and a further secondary school join the Trust (Paulet High School).
- The Trust has also seen growth via the free school programme, with the successful opening and growth of John Taylor Free School (opened September 2018, and over-subscribed every year since), the scheduling of Fradley Park Primary and Nursery School (local authority presumption), Rugeley John Taylor All-Through School and Branston Locks Primary (see below for details).
- JTMAT supported one of its schools’ successful application to become a Research School in 2019 – one of only 12 awarded nationally, with only “outstanding” schools eligible to apply. The Staffordshire Research School has become an important sub-regional component in school improvement services.
- The Trust team codeveloped with John Taylor High the successful application for Teaching School Hub status, and the subsequent reconfiguration of the National Forest Teaching School to upscale provision across a larger geographical footprint (WM3 – Cannock, Lichfield, East Staffordshire, Tamworth, Nuneaton and Bedworth and North Warwickshire) and with a revised remit to deliver the new Early Career Framework and a re-structured suite of National Professional Qualifications (NPQs).

- In response to growth, and in order to offer more services of greater diversity, the Trust's central team has expanded to include a dedicated Human Resources Manager, an Estates Manager, an Attendance Intervention Manager, and an additional Trust IT Technician.

Statement on Growth:

The period covered by this Strategic Plan includes known growth: Fradley Park Primary and Nursery School is set to open in September 2022, an all-through school at Rugeley for 3-18 year-olds is scheduled for opening in September 2023, and we also prepare for the opening of a further primary school with nursery at Branston Locks, earmarked for September 2024.

It is also relevant to note that the Trust's current open free school, John Taylor Free School (opened in September 2018) continues to admit a new cohort of children each year, and this will be the case throughout the duration of this strategic plan – the school set to achieve “steady state” in September 2024.

Whilst the Trust anticipates, and hopes for, additional growth from ‘converter’ and potentially ‘sponsored’ schools, it has been determined not to place a specific number in this plan – as growth is neither a “goal” nor a “target” in itself. The Trust will grow as and when schools that have an alignment with our vision and values determine that it is in the interests of their communities to work with us, and we in turn believe that we can be of value to the school and it can be of value to the Trust.

The Chair of the Trust has stated repeatedly that the growth of the Trust will not be paid for by the children we currently serve. As an organisation that is viable and vibrant, growth is not a necessary contingent for our future. The Chair of the Trust has also stated that we will only grow to a point at which we can still ‘know’ our schools, and they know us. This relates to quality of relationship – a depth of understanding that we would argue sets us apart from many. These two tenets will be ever-present in our considerations.

Mission Statement

‘We believe in the power of education to improve lives – and the world’

This statement is at the heart of the John Taylor story. We are driven to ensure that our communities can realise their true potential through learning. This is our mission. To that end, we provide the experiences, resources, structures and systems to enable all to engage, all to progress, all to achieve. Through the opportunities that our Multi-Academy Trust offers, we extend our mission beyond the school in which it originated.

Trust Aims

- A. Children and young people are well-prepared for the next stage in their lives through experiencing the best learning opportunities through exceptional teaching and support, and access to high quality resources and provision in and beyond the classroom. Our schools' curricula enrich and inspire more than those found elsewhere.
- B. Children achieve more, and make better progress, by attending a JTMAT academy than would otherwise be expected. We add value.
- C. Our academies are full, and always oversubscribed as a result of their popularity, reputation and success.
- D. Our academies are staffed with high-performing professionals, exhibiting passion and taking pride in their work which is underpinned by evidence-informed best practice, in a context of effective support and challenge. Impressive and ambitious people aspire to work for JTMAT.
- E. Individuals are recognised and valued by our academies, and the Multi-Academy Trust, where we place high value on the physical and mental health and the wellbeing of all with whom we engage.
- F. Accommodation and premises are safe, well-maintained, and with facilities that are constantly improving.
- G. Infrastructure is both effective and efficient, underpinned by sound financial management practices whereby value for money is always given due regard.
- H. Management systems are coherent and cohesive, and staffed by colleagues who are innovative, adaptable, and capable of absorbing new initiatives.
- I. Our academies, and the Multi-Academy Trust, are held in the highest regard by others within and beyond the education sector, and our work and its impact is validated by external accreditation and inspection.

Keys to Success

Our commitment to ensure learning is at the heart of all we do: Keeping “the main thing, the main thing” – prioritising our people, time, energy and funding to the improvement of the educational experience – both formal and informal - we provide.

A passion for excellence: Only comparing ourselves with the best. When finding it, seeking to match and then surpass it.

Restlessness and curiosity: Looking for opportunity to be involved and to learn from new experiences.

Courage to innovate: Leading change – in teaching and learning, curriculum development, organisational structures.

Tenacity and resilience: Holding to our mission in times of turbulence, and remaining resolute until we achieve what we set out to do.

Collegiality: Listening to others, sharing with others, learning from others.

Tolerance and respect: Modelling, reinforcing and developing personal integrity across our communities.

Objectives

We intend to move our Trust towards these objectives through the following five sets of Objectives:

- 1) Teaching and Learning
- 2) Curriculum and Assessment
- 3) Leadership and Governance
- 4) People Development
- 5) Infrastructure and Support

Each objective contains a number of strategies, and consequent activities. These are articulated in this document in the form of termly milestones. A dynamic, online iteration of this plan is placed on SchoolIP – the Trust’s preferred software for improvement planning, performance management and self-evaluation, already used within all our schools. As a result, we will be able to disseminate key priorities from the Trust’s plans and into our schools for delivery where appropriate.

N.B: Aspects of the plan require some alignment of practices. Where this is the case, the MAT aims to achieve the objectives through centrally supported collaborative convergence, whereby the central teams facilitates collaboration that results in the desired alignment as opposed to defining the way things should be done.



Our MAT School Improvement offer

Central School Improvement Team

Our central School improvement Team is supported in 2021 – 2022 by secondee appointments to the following roles

Primary English lead

Primary Maths lead

EYFS lead

Early Career Framework lead

John Taylor TS hub

John Taylor High School was designated a Teaching School hub in 2021. The Hub has an important role to play in the training and development of teachers and leaders throughout their career, providing a golden thread of evidence-based programmes and qualifications which will effectively support both the effective recruitment and retention of high quality teachers and leaders in our Trust. People development is one of the key priorities within our 3 year strategic plan and the TS hub will be instrumental in ensuring that we can deliver successfully on this.

Through the TS hub our schools will benefit by providing:

- Direct access to trainee teachers
- Local ECT training and support for Early Career Teachers from our ECT secondee
- Access to a full suite of specialist and leadership NPQs delivered locally
- The Appropriate Body Services offered by the TS hub

JTMAT Professional Development Offer

JTMAT will seek to establish training and development needs across the Trust and in collaboration with the TS hub, to ensure that the “other CPD” designed by the TS hub includes programmes to meet those needs. The Trust will subsidise* a range of courses and programmes included in this offer as follows:

- Primary NQT+1 programme
- Secondary NQT+1 programme
- Effective middle leadership
- Aspiring to senior leadership
- The Aspirant Headteacher programme
- All programmes offered through the Research School

**1st place will be free*

2nd place will receive a 50% discount

3rd and subsequent places a 25% discount

In addition, as identified in the strategic plan, JTMAT wishes to support and promote the development of a coaching culture in all our schools. A coaching programme will be offered through the TS hub and this will be discounted by 50% per participant for JTMAT schools.

Staffordshire Research School

JTMAT is also home to the Staffordshire Research School and alongside the TS hub will be instrumental in supporting us to deliver on various aspects of the strategic plan. In addition to access to subsidised EEF programmes delivered locally, there will be opportunity for identified Evidence Leads from each school in the Trust to form a network, led by the Operational Research Lead, to support collaboration and dissemination of best practice within all our schools.

Network meetings

Other JTMAT network groups will continue with some of them meeting for extended blocks of time to undertake specific work on the Curriculum, Teaching and Learning and Assessment. By strategically planning opportunities for collaboration, we aim to strengthen cross school working, the sharing of resources and best practice and have a positive impact on staff workload and wellbeing.

Reviews

All schools will have access to free Pupil Premium checks and SEND reviews according to identified need.

We do however recognise that there are times when we must look beyond our own resources to secure the high-quality inputs needed by our schools individually or the Trust collectively. Here, John Taylor Multi-Academy Trust will look to source such inputs from other Multi-Academy Trusts and Teaching School hubs. This is because:

- a. Other MATs and Teaching Schools Hubs will have a clear understanding of our needs due to the similarity of their own context
- b. As social enterprises, any income they derive will be put back into the sector – and ultimately benefit children and their education
- c. Forging relationships with other Trusts and Teaching Schools Hubs builds our capacity, and provides opportunity for reciprocal arrangements
- d. John Taylor MAT and the John Taylor Teaching School Hub are already connected to regional networks that enable such discussions to take place readily.

Only in the event that we cannot secure external support of appropriate quality through a MAT or Teaching School Hub will we look to commercial suppliers and contractors.

Key Performance Indicators

Members and trustees must have the skills, knowledge and experience to run the Multi Academy Trust. Their duties include ensuring that the trust's funds are used only in accordance with the law, its articles of association, its funding agreement and the Academies Financial handbook.

Governance KPIs

1. Ensure that distinction is achieved between Member and Trustee roles within the MAT as enshrined in documentation.
2. 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.
3. All schools have a full complement for their Local Governing Bodies, with an appropriate set of skills and experiences to undertake their defined responsibilities

Financial KPIs

1. Ensure economy, efficiency and effectiveness over the use of Trust funds (value for money).
2. Assurance received that annual financial accounts have been properly prepared and are free of material misstatements.
3. Accounts filed with Companies house for public access by 31 December each year and on the Trust website by 31 January of the following year.
4. All statutory returns submitted on time
5. Staffing costs capped at 80% of total Trust income.
6. Alternative sources of funding are pursued, consistent with the Trust's core competencies
7. Sufficient levels of income are generated to support the asset base of the Trust
8. Sources of funding pursued for capital development projects

Human Resource KPIs

1. All MAT academies fully staffed with high calibre staff
2. Pupil to teacher ratios are favourable compared to national levels
3. Development opportunities made available to staff to work across schools in the MAT
4. 100% training penetration rate achieved (calculated as % of employees completing a course of training compared to total number of employees employed).
5. 100% performance management penetration for all eligible staff across all MAT schools.

School Standards KPIs

- 1 All MAT schools retain or improve their Ofsted inspection rating
- 2 Parent, staff and student survey data illustrates satisfaction.
- 3 Schools can demonstrate the adding of value to children of all ages, abilities, and backgrounds
- 4 All schools are fully compliant with health and safety, safeguarding and other statutory requirements
- 5 All schools are improving their MAT categorisation towards 'Leading'



John Taylor Multi-Academy Trust

3 Year Strategic Plan

Priority 1: Teaching and Learning

Objectives

1. To establish and embed a set of core, research-informed pedagogical principles across the Trust to which underpins Teaching and learning and professional development
2. To agree and implement a common approach to the quality assurance of teaching and learning, ensuring a common language for teaching and learning conversations which supports cross-school working and sharing of best practice.
3. To ensure that all schools are aware of, engage in and benefit from the opportunities provided through the Research School and Teaching School hub
4. To establish, support and embed a genuine culture of collaboration, where staff in a range of different roles are given opportunities to work together
5. To strengthen pedagogical expertise and accelerate improvement in outcomes through teachers engaging in enquiry-based learning, sharing classroom experiences and trying out new things.

Success Criteria

1. JT MAT core principles of Teaching and Learning are embedded in all Teaching and Learning documentation and practices.
2. Professional development within JT MAT schools is evidence informed and aligns with JT Mat core principles of Teaching and Learning
3. Drawing on best practice, a common approach to observations, work scrutiny, pupil voice supports accurate evaluation of Teaching and Learning across all MAT schools
4. Identified MAT Teaching and Learning priorities inform the TS hub and RS offer
5. All JTMAT schools can cite meaningful examples and case studies of staff development and school improvement that is as a direct result of engagement in the provision of the Staffordshire Research School and the John Taylor Teaching School Hub
6. All schools have made a significant contribution to the Teaching and Learning Repository and the Trust can evidence that it is well used and valued by colleagues
7. Curriculum projects are showcased, and their impacts shared across the Trust
8. A JT MAT publication encapsulates the learning from enquiry based projects and this is shared across the Trust
9. The evaluation of Teaching and Learning across all schools is at least good as evidenced by internal moderation, peer reviews or external

Teaching and Learning									
Actions	2021-2022			2022 - 2023			2023-2024		
	1	2	3	1	2	3	1	2	3
Objective 1: Core principles of Teaching and Learning	Current T+L document reviewed, revised to include JT MAT agreed core principles of T&L	Revised core principles shared with schools and included in the 'New joiners' guide'	Language of agreed T&L principles is embedded in SDPs and school T&L documentation			T & L document reviewed, evaluated and shared Language of agreed T&L principles is embedded in SDPs and school T&L documentation			T & L document reviewed, evaluated and shared Language of agreed T&L principles is embedded in SDPs and school T&L documentation
	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles and recommend any revisions to inform review of T&L document	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles	Teaching and Learning network activities focus on JT MAT core T&L principles and recommend any revisions to inform review of T&L document	Teaching and Learning network activities focus on JT MAT core T&L principles
Objective 2: Quality Assurance		QA of Teaching and Learning 1: audit of approaches to learning walks and observations and how the data is used	Agree evaluative approaches to observations and learning walk for implementation 2022	QA of T+L 2 : audit approaches to work scrutiny		Agree evaluative approaches to work scrutiny for implementation 2023	QA of T+L 3: audit approaches to pupil voice activity		Agree evaluative approach to pupil voice activities for implementation 2024
	Format for Peer reviews for the year agreed and mapped out	SLT peer reviews focused on T+L to take place	SLT peer reviews focused on T+L to take place	Format for Peer reviews for the year agreed and mapped out	SLT peer reviews focused on T+L to take place	SLT peer reviews focused on T+L to take place English and Maths Peer views to take place (Secondary)	Format for Peer reviews for the year agreed and mapped out	SLT peer reviews focused on T+L to take place	SLT peer reviews focused on T+L to take place Humanities Peer reviews to take place (Secondary)
		SIP Team undertake moderation of Teaching and Learning			SIP Team undertake moderation of Teaching and Learning			SIP Team undertake moderation of Teaching and Learning	

Objective 3: Engagement in	Annual overview of TS hub and RS school offer shared identifying any MAT			Annual overview of TS hub and RS school offer shared identifying any			Annual overview of TS hub and RS school offer shared identifying any		
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professional development via TS hub and Research school	supported programmes			MAT supported programmes			MAT supported programmes		
	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered Recruit for new ELEs from JT MAT	Schools receive Research School and Teaching School Hub newsletter	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered Recruit for new ELEs from JT MAT	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered	Schools receive Research School and Teaching School Hub newsletter and update on programmes offered Recruit for new ELEs from JT MAT
	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities	Colleagues engage in T&L programmes offered through TS hub and RS School according to school Teaching and Learning priorities
	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee	Audit of engagement in TS hub and RS School offer completed and shared with Achievement and progress committee
			School Teaching and Learning priorities across the MAT collated and inform 2022 TS hub and RS offer			School Teaching and Learning priorities across the MAT collated and inform 2023 TS hub and RS offer			School Teaching and Learning priorities across the MAT collated and inform 2024 TS hub and RS offer
Objective 4: Collaborative opportunities	Re-designed T&L repository launched and expectations for usage shared		Review of functionality of the repository			Review of functionality of the repository			Review of functionality of the repository

	with all leaders								
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	Leaders promote usage of the repository within their own school Termly report on school usage presented to the MAT Core Team			Leaders promote usage of the repository within their own school Termly report on school usage presented to the MAT Core Team			Leaders promote usage of the repository within their own school Termly report on school usage presented to the MAT Core Team		
	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team	Termly report on school usage presented to the MAT Core Team
	Cross school curriculum projects reflecting our vision /core T&L principles agreed upon for the year (where appropriate could include a student leadership role?	Curriculum project takes place	Cross school curriculum projects showcased and evaluated for impact. Evaluation to include pupil voice	Cross school curriculum projects reflecting our vision /core T&L principles agreed upon for the year (where appropriate could include a student leadership role?	Curriculum project takes place	Curriculum projects showcased and evaluated for impact. Evaluation to include pupil voice	Curriculum projects reflecting our vision /core T&L principles agreed upon for the year (where appropriate could include a student leadership role?	Curriculum project takes place	Curriculum projects showcased and evaluated for impact. Evaluation to include pupil voice
	Collaborative / cross school enquiry based Teaching and Learning opportunities identified	Cross school enquiry based learning takes place	Outcomes /findings from enquiry based learning shared	Collaborative / cross school enquiry based Teaching and Learning opportunities identified	Cross school enquiry based learning takes place	Outcomes /findings from enquiry based learning shared	Collaborative / cross school enquiry based Teaching and Learning opportunities identified	Cross school enquiry based learning takes place	Outcomes /findings from enquiry based learning shared
	Network meetings established to support delivery of the strategic plan and schedule of meetings for the year agreed		Trust training day takes place	Network meetings established to support delivery of the strategic plan and schedule of meetings for the year agreed		Trust training day takes place	Network meetings established to support delivery of the strategic plan and schedule of meetings for the year agreed		Trust training day takes place

Objective 5: Strengthening pedagogical expertise	Schools to identify a research leads/champions			School Research leads/ champions support development of internal PD			School Research leads/ champions support development of internal PD		
	School Research leads/ champions support development of internal PD								
	Schools plan Internal Professional development programme with a strong focus on research informed Teaching and Learning including subject pedagogy	Professional development leads update on PD activity via network meetings	Evaluation of internal Professional development (T+L) Shared at MAT Teaching and Learning network group	Schools plan Internal Professional development programme with a strong focus on research informed Teaching and Learning including subject pedagogy	Professional development leads update on PD activity via network meetings	Evaluation of internal Professional development (T+L) Shared at MAT Teaching and Learning network group	Schools plan Internal Professional development programme with a strong focus on research informed Teaching and Learning including subject pedagogy	Professional development leads update on PD activity via network meetings	Evaluation of internal Professional development (T+L) Shared at MAT Teaching and Learning network group
	Each school engages in inquiry based learning		Virtual showcase event of inquiry based learning	Each school engages in inquiry based learning		Virtual showcase event of inquiry based learning	Each school engages in inquiry based learning		Virtual showcase event of inquiry based learning
			MAT publication of inquiry based learning projects			MAT publication of inquiry based learning projects			MAT publication of inquiry based learning projects
		Applications from staff for funding/part funding for MEd or equivalent for 2022			Applications from staff for funding/part funding for MEd or equivalent for 2023	Med projects showcased at MAT meetings, subject leaders/heads/exec/A&P		Applications from staff for funding/part funding for MEd or equivalent for 2024	Med projects showcased at MAT meetings, subject leaders/heads/exec/A&P

Priority 2: Curriculum and Assessment

Objectives

1. To develop, in identified subjects, an aligned, rich, research-informed, rigorous and coherent curriculum through professional collaboration and effectively implement for the benefit of all pupils within the Trust.
2. To align curricula and approaches to assessment across schools within the MAT to drive academic improvement through the facilitation of collaboration, sharing best practice and supporting staff workload
3. To align approaches to summative assessment ensuring they are consistent and robust and use a common language enabling accurate evaluation of the performance of individual pupils, focus groups and subjects both within individual schools and across the Trust

Success Criteria

1. English and Maths teams across the Trust have collaboratively designed and implemented a common KS3 curriculum in the respective subject areas and planned end of year assessments
2. History and Geography teams across the Trust have collaboratively designed and implemented a common curriculum for Year 7 in the respective subject areas
3. Science Teams across the Trust have a common Year 7 curriculum planned for implementation September 2024
4. Secondary schools are using or have plans to use a common exam Board at KS4
5. KS3 assessment systems are aligned
6. Primary Science, Computing, History and Geography teams across the Trust have collaboratively designed and implemented a common KS1 and 2 curricula in the respective subject areas
7. Primary Art and Design teams across the Trust have a common KS1 and 2 curricula planned for implementation September 2024
8. All Trust Schools present data to the Trust in a common format and using a common language

Curriculum and Assessment									
Success	2021-2022			2022 - 2023			2023-2024		
	1	2	3	1	2	3	1	2	3
Objective 1:Curriculum	Agree a Trust wide curriculum intent								
	Selected middle leaders access EEF training on curriculum development			Selected middle leaders access EEF training on curriculum development			Selected middle leaders access EEF training on curriculum development		
	Schools plan for staff engagement in training re effective pedagogies								
		KS3 curriculum audit of English and Maths undertaken as pre cursor to work on KS3 curriculum alignment	Schools map the extended/ enhanced curriculum across all key stages	KS3 curriculum audit for Science undertaken as pre cursor to work on KS3 curriculum alignment	Schools map all aspects of Personal Development across KS5		KS3 curriculum audit of History and Geography undertaken as pre cursor to work on KS3 curriculum alignment		All secondary schools confirm to the Trust that they have undertaken a subject offer review for either or both KS4 and/or KS5
		Schools map all aspects of Personal Development across KS1,2 3 and 4							
	EYFS secondee supports schools adopting the new Early Years Framework	EY secondee provides Achievement and Progress Committee and improvement partners with an interim review of implementation and outcomes of baselines.	EY secondee provides Achievement and Progress Committee with a review of implementation and recommendations for next steps.						
	Reception baselines to be aligned (NFER)								

Objective 2: Curriculum alignment secondary	Agree Framework for curriculum planning								
	<p>Identify secondary Subject curators for maths and English from each school</p> <p>Source external subject specialists to provide support and challenge for English and Maths curriculum groups</p>	<p>English and maths curriculum groups share audits/long/medium term plans</p> <p>Agree curriculum intent for KS3 English and maths</p> <p>Revised KS3 long term plans for maths and English completed</p>	<p>Y7 English and maths medium term plans in place</p> <p>English and maths decide on exam board that all will begin to implement September 2023</p>	<p>Y7 revised curriculum implemented in English and maths</p> <p>English and Maths assessment groups agree a schedule of assessments + weightings</p> <p>Align use of Y7 E and M marksheets</p>	<p>Y7 English and maths assessment written</p>	<p>Y7 Common assessment completed in English and maths</p> <p>Cross school moderation of English and maths assessments takes place</p> <p>Y7 Assessment outcomes in English and maths reported to MAT</p> <p>English and maths Medium term plans in place for Y8</p> <p>English and maths curriculum group evaluates Y7 curriculum</p>	<p>Y8 revised curriculum implemented in E and M</p> <p>Schedule of Y8 English and maths assessments and weighting agreed</p> <p>Align use of Y8 E and M marksheets</p>		<p>Year 8 common assessment completed in English and maths</p> <p>Y8 Assessment outcomes reported to MAT</p> <p>Cross school moderation of Y8 English and maths assessments takes place</p> <p>English and maths evaluate Y 8 curriculum</p> <p>Year 9 English and maths medium term plans in place for</p>
									implementation 2025

									English and maths commence planning for greater curricula and assessment alignment in KS4
				<p>Identify secondary Subject curators for Science from each school Source SLEs or equivalent to provide support and challenge for Science curriculum groups</p> <p>Science decides on exam board that all will begin to implement September 2024</p>	<p>Science curriculum group shares audits/long/medium term plans</p> <p>Agree curriculum intent for KS3 Science</p> <p>Revised KS3 long term plans for Science completed (Reads as English and Maths)</p>	Complete Y7 medium term plans for Science built around the framework for curriculum planning	<p>Y7 revised curriculum implemented in Science</p> <p>Science assessment group agrees a schedule of assessments + weightings</p> <p>Align use of Y7 Science marksheets</p>	Y7 Science assessments written	<p>Y7 Common assessment completed in Science</p> <p>Cross school moderation of Science assessments takes place</p> <p>Y7 Assessment outcomes in Science reported to MAT</p> <p>Science Medium term plans in place for Y8</p> <p>Science curriculum groups evaluate Y7 curriculum</p>

							<p>Identify secondary Subject curators for History and Geography from each school</p> <p>Source SLEs or equivalent to provide support and challenge for History and Geography curriculum group</p> <p>History and Geography decide on exam board that all will begin to implement September 2025</p>	<p>History and Geography curriculum group shares audits/long/medium term plans</p> <p>Agree curriculum intent for KS3 in History and Geography</p> <p>Revised KS3 long term plans for S History and Geography completed</p>	<p>Medium term plans for History and Geography built around the framework for curriculum planning completed for Year 7</p> <p>Complete Y7 medium term plans for History and Geography built around the framework for curriculum planning Year</p> <p>Publish plan for future work re curriculum alignment across other subjects and key stages</p>
Objective 2: Curriculum alignment Primary	English and Maths secondees to audit subject content	English and maths secondees report findings and recommendations to achievement and progress committee	English and Maths secondees report changes made as a result of the initial audit						

	Subject curators for computing and science from each school identified. Working with specialists, to analyse curriculum content and delivery across schools through audit	Computing and Science curators to agree curriculum intents a by sharing audits/long/medium term plans	Computing and science curators agree the direction and content of each subject from Sept 22, to include staff briefings and training as required	Interim review of computing and Science curriculums to check for pace and pitch of learning					
				Subject curators for History and Geography	History and Geography curators	History and Geography curators	Interim review of History and		

				from each school identified. Working with specialists, to analyse curriculum content and delivery across schools through audit	to agree curriculum intents a by sharing audits/long/medium term plans	agree the direction and content of each subject from Sept 23, to include staff briefings and training as required	Geography curriculums to check for pace and pitch of learning		
							Subject curators for Art and DT from each school identified. Working with specialists, to analyse curriculum content and delivery across schools through audit	Art and DT curators to agree curriculum intents a by sharing audits/long/medium term plans	Art and DT curators agree the direction and content of each subject from Sept 24 to include staff briefings and training as required

	Classroom monitor is used by schools in its current form for all foundation subjects		Classroom Monitor is aligned for Computing and science (changes made by CM if required)			Classroom Monitor is aligned for History and Geography (changes made by CM if required)			Classroom Monitor is aligned for Art and DT (changes made by CM if required)
Objective 3: KS3 Assessment Assessment	An agreed common approach to target setting is implemented for year 7								
	Begin development of a consistent approach to KS3 assessment for		Finalise arrangements for KS3 common	Implement new KS3 assessment system					
	implementation September 2022		assessment system.						
							Undertake review of arrangements for reporting to Parents that is common across the Trust		Agree a MAT wide reporting system in place for implementation 2025

Objective 3: Summative assessment	All schools share their schedule of data collections								
	<p>A template for Schools to share 2021 data completed by schools and collated by the MAT for the Trust Board</p> <p>Develop a template for termly presentation of performance data to MAT and LGBs</p> <p>SI partners meet with leaders to review 2020 data</p> <p>2021 School achievement update presented at Achievement and Progress Committee</p>	<p>Termly conversation with MAT schools re performance data</p> <p>Share update on school achievement at Achievement and Progress Committee</p>	GL summative assessments (secondary) completed in line with MAT guidance	<p>A template for Schools to share 2022 data completed by schools and collated by the MAT for the Trust Board</p> <p>SI partners meet with leaders to review 2022 data</p> <p>2022 School achievement update</p>	Share update on school achievement at Achievement and Progress Committee	<p>Schools present end of Year 7 summative data to the MAT in a common format</p> <p>Share update on school achievement at Achievement and Progress Committee</p> <p>GL summative assessments (secondary) completed in line with MAT guidance</p>	<p>A template for Schools to share 2023 data completed by schools and collated by the MAT for the Trust Board</p> <p>GL baseline assessments (secondary) are completed within in line with MAT guidance</p>	<p>Share update on school achievement at Achievement and Progress Committee</p> <p>Share update on school achievement at Achievement and Progress Committee</p>	<p>Schools present end of Year 7 and 8 summative data to the MAT in a common format</p> <p>Share update on school achievement at Achievement and Progress Committee</p> <p>GL summative assessments (secondary) completed in line with MAT guidance</p>
	GL baseline assessments (secondary) are completed within in line with MAT guidance			<p>presented at Achievement and Progress Committee</p> <p>GL baseline assessments (secondary) are completed within in line with MAT guidance</p>					

Priority 3: Leadership and Governance

Objectives

1. To ensure all JT MAT Governors and Directors/Members are confident and effective in their role.
2. To encourage leaders at all levels to contribute to the culture and collective endeavour of the Trust
3. To embed a clear talent management and succession planning strategy across the MAT and a commitment to ongoing leadership development.
4. To invest in leaders at all levels within the MAT ensuring that are well equipped to inspire, lead, manage and challenge others to make changes, leading to improved outcomes for pupils and manage succession challenges effectively.
5. To provide secondment and shadowing opportunities to broaden the experience of the best and emerging leaders to support all schools and pupils within the Trust
6. To plan and implement Student / Pupil leadership opportunities and ensure they are fully exploited
7. To ensure that ethical leadership underpins all Trust operations
8. To maintain and develop Trust-wide partnerships to support school improvement.
9. To support and promote a culture within the MAT which is supportive and ever mindful of staff workload and well-being
10. To ensure that Trust growth is well-managed as new schools – both converters and free schools - and their staff and governor communities are inducted into the expectations, systems and ways of working of JT MAT

Success Criteria

1. Governors have access to a comprehensive induction and training package which accelerate their knowledge and understanding of the school
2. Governors are highly effective
3. Headteachers and school leaders make a positive contribution to Trust priorities as evidenced in performance management and school development plans
4. There are clear succession plans in place at both school and Trust level
5. All leaders have completed an NPQ relevant to their role within 2 years of taking up the post
6. Seconded are able to evidence impact of their school improvement work across Trust schools
7. All schools have engaged in shadowing opportunities and can evidence how it has benefitted their own setting or practice
8. All schools have identified a range of student leadership opportunities and recruited student leaders accordingly
9. Pupil and student leaders across the Trust participate in opportunities within and beyond their school
10. There is a strong culture of ethical leadership within our schools as evidenced through collaborative practices
11. The Trust has developed strong partnerships with other Trusts and organisations
12. Staff surveys evidence that the Trust is mindful of workload and well-being
13. New schools feedback positively on their induction into the Trust

Leadership and Governance									
Actions	2021-2022			2022 - 2023			2023-2024		
	1	2	3	1	2	3	1	2	3
Objective 1: Governors	Induction pack launched and promoted to governors/directors via LGBs, SRG, MAT Board. Uploaded to portal (revised edition).	Training and induction (on-going as required)	.Induction materials reviewed, amended and re-issued for 2022/23.	Induction promoted to governors/directors via LGBs, SRG, MAT Board. Uploaded to portal (revised edition).	Training and induction (on-going as required)	Induction materials reviewed, amended and re-issued for 2022/23.	Induction promoted to governors/directors via LGBs, SRG, MAT Board. Uploaded to portal (revised edition).	Training and induction (on-going as required)	Induction materials reviewed, amended and re-issued for 2022/23.
	Skills audits analysed by LGBs and MAT Board and succession planning needs/skills deficits shared.	Observation of LGB meetings by governors and directors arranged as requested.	Skills audit/succession planning activities undertaken	Skills audits analysed by LGBs and MAT Board and succession planning needs/skills deficits shared.	Observation of LGB meetings by governors and directors arranged as requested.	Skills audit/succession planning activities undertaken	Skills audits analysed by LGBs and MAT Board and succession planning needs/skills deficits shared.	Observation of LGB meetings by governors and directors arranged as requested.	Skills audit/succession planning activities undertaken
		Governor and director networking event takes place.	Governance conference takes place		Governor and director networking event takes place.	Governance conference takes place.		Governor and director networking event takes place.	Governance conference takes place.
Objective 2: MAT culture	PM leadership development target link to strategic plan.	Interim PM reviews – with Trust priority target progress discussed.		PM leadership development target link to strategic plan.	Interim PM reviews – with Trust priority target progress discussed.		PM leadership development target link to strategic plan.	Interim PM reviews – with Trust priority target progress discussed.	New Trust Strategic Plan (2024-27) produced, and initial discussions re: Heads' PM targets undertaken.

	School development plans cross-referenced with MAT Strategic Plan (all on SchoolIP)	School development plan progress fed back to Trust Board, and discussed at length at Achievement and Progress Committee. Remedial actions discussed with School Improvement	School development plan progress reviewed, and fed back to Trust Board (July) and discussed at length at Achievement and Progress Committee (July)	School development plans cross-referenced with MAT Strategic Plan (all on SchoolIP)	School development plan progress fed back to Trust Board, and discussed at length at Achievement and Progress Committee. Remedial actions discussed with School	School development plan progress reviewed, and fed back to Trust Board (July) and discussed at length at Achievement and Progress Committee (July)	School development plans cross-referenced with MAT Strategic Plan (all on SchoolIP)	School development plan progress fed back to Trust Board, and discussed at length at Achievement and Progress Committee. Remedial actions discussed with School Improvement	School development plan progress reviewed, and fed back to Trust Board (July) and discussed at length at Achievement and Progress Committee (July)
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		Partner/CEO as required.			Improvement Partner/CEO as required.			Partner/CEO as required.	
Objective 3: Talent Management and Succession Planning	School workforce profile shared with the Trust			Updated workforce profile shared with the Trust			Updated workforce profile shared with the Trust		
	Develop a MAT succession planning strategy and share with schools	Using the MAT succession planning strategy, schools undertake their own succession planning			Schools review succession planning considerations			Schools review succession planning considerations	
		Trust succession planning is formally undertaken for Directors and core team employees			Trust reviews succession planning considerations			Trust reviews succession plan considerations	

						School SEFs address workforce capacity and development			School SEFs address workforce capacity and development
						School improvement plans make clear links to leadership development and			School improvement plans make clear links to leadership development and
Objective 4: : Leadership (see also People Development)	Recruitment pack reflects expectation that post-holders have required accreditation or equivalent or will undertake within two years.					Ensure that leadership post-holders recruited under new expectations have achieved accreditation when two year moratorium has elapsed. (on-going)			
	MAT supported leadership programmes			MAT supported leadership programmes			MAT supported leadership programmes		

	agreed and communicated			agreed and communicated			agreed and communicated		
	Audit of leadership qualifications undertaken.			Audit of leadership qualifications undertaken			Audit of leadership qualifications undertaken		
	Training needs discussed as part of PM process with reference to the career pathways document			Training needs discussed as part of PM process with reference to the career pathways document			Training needs discussed as part of PM process with reference to the career pathways document		
	Schools develop an indicative			School indicative leadership plan			School indicative		

	three-year leadership development plan and share with the Trust			updated and shared with the Trust			leadership plan updated and shared with the Trust		
	Schools engage in at least one of the new Specialist NPQs. Across the MAT there is full coverage of the Specialist NPQs			Schools engage in a second Specialist NPQ			Schools engage in a third specialist NPQ		
	Colleagues have access to the full suite of NPQs via the TShub			Colleagues have access to the full suite of NPQs via the TShub			Colleagues have access to the full suite of NPQs via the TShub		
)		Trust liaises with the TShub and Research school re leadership development needs for 2022			Trust liaises with the TShub and Research school re leadership development needs for 2023			Trust liaises with the TShub and Research school re leadership development needs for 2024
Objective 5: Secondments and shadowing	More MAT-wide secondment opportunities (incl. Early Years, English primary, Maths	MAT-wide secondees provide an interim report and present to Achievement and Progress	MAT-wide secondees have a review of impact with school improvement partners and present 'next steps'	Induct and commence work of new MAT-wide secondees.	MAT-wide secondees provide an interim report and present to Achievement and Progress	MAT-wide secondees have a review of impact with school improvement partners and	Induct and commence work of new MAT-wide secondees.	MAT-wide secondees provide an interim report and present to Achievement and Progress	MAT-wide secondees have a review of impact with school improvement partners and present 'next steps' to Achievement and Progress Committee (July)

	primary, ECF) to be offered. Vacancies to be considered as secondments as well as permanent re: recruitment.	Committee on their impact to date, remedial action being undertaken and proposed next steps.	to Achievement and Progress Committee (July) Establish and recruit to new Trust-wide secondments for 2022/23.		Committee on their impact to date, remedial action being undertaken and proposed next steps.	present 'next steps' to Achievement and Progress Committee (July) Establish and recruit to new Trust-wide secondments for 2023/24.		Committee on their impact to date, remedial action being undertaken and proposed next steps.	Establish and recruit to new Trust-wide secondments for 2024/25.
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	Re-visit shadowing protocols. SIP/CEO agree a schedule with schools to observe SLT/LGB meetings		SLT observations (see above)	Publicise shadowing opportunities across the Trust. SIP/CEO agree a schedule with schools to observe SLT/LGB meetings			Publicise shadowing opportunities across the Trust. SIP/CEO agree a schedule with schools to observe SLT/LGB meetings		
Objective 6:: Pupil and student leadership	Develop a Trust-wide understanding of what high quality pupil and student leadership provision may look like in all our schools – and define core principles and minimum expectations.		School development plans are written to include Pupil Leadership opportunities			School development plans are written to include Pupil Leadership opportunities			School development plans are written to include Pupil Leadership opportunities
	Trust Pupil and Student liaison group. Networks for each key stage.	A pupil and student leadership event is planned for summer term (July)	Pupil and student leadership event takes place, and is reviewed.		A pupil and student leadership event is planned for summer term (July)	Pupil and student leadership event takes place, and is reviewed. Review of provision is shared with Trust Board.		A pupil and student leadership event is planned for summer term (July)	Pupil and student leadership event takes place, and is reviewed. Review of provision is shared with Trust Board.
	Pupil leadership		Pupil Leadership champion is						Pupil leadership opportunities extend beyond
	provision and resources shared via T and L repository.		appointed by the Trust.						the Trust's schools (e.g. national competitions)

Objective 7: A culture of ethical leadership	<p>Ethical leadership framework shared with all leaders, governors and directors.</p> <p>Pathfinder schools' (TRIS and JTFS) developments shared across all schools for consideration/incorporation. Resources shared via T and L Repository</p>	Staff surveys are amended to include content on ethical leadership	<p>School Development Plans to incorporate specific reference to the development of ethical leadership. School SEFs to reference ethical leadership.</p> <p>Trust recruitment pack to incorporate section on requirements for ethical leadership.</p>	Resources relating to ethical leadership placed on governance portal.	Trust Framework of Effectiveness to incorporate an indicator relating to ethical leadership for evaluation from September 2023.	Seek accreditation and/or request external audit on ethical leadership.	Collate and moderate framework evaluations on ethical leadership across the Trust. Develop action plans if required, and share effective practice across all schools.	Review and revise all ethical leadership provision and evaluation.	Trust's new strategic plan (2024-27) incorporates further provision and emphasis on ethical leadership.
	Coaches within the Trust or contracted by it (or its schools) are selected on the basis of their understanding of and adherence to the ethical leadership framework	LGBs to complete the NGS Ethical leadership Audit to inform priorities	<p>Governance conference to feature specific content on ethical leadership and the implications for LGBs and the Trust Board.</p> <p>Schools who have taken on Ethical leadership focus to present at the conference</p>	Pupil and student leadership event planned for summer term incorporates elements of ethical leadership.	<p>Trust-wide training day (summer term 2022) planned with ethical leadership element included in the programme.</p> <p>LGB to revisit NGA audit</p>		Implement findings of audit or recommendations of accreditation process.		
Objective 8: Partnerships beyond the Trust	Development of partnerships with partners via the TS Hub, Research School, MAT-to-MAT and other opportunities.	Seek to extend school-centered partnerships with other organisations to Trust-wide where relevant.	Audit of all partnerships – including industrial and with HEIs and look to extend further, particularly where provision for pupils and staff development opportunities may		TS Hub interim peer review (Thornden School, Hampshire) undertaken. Findings shared and recommendations implemented.				

			require or benefit from it.						
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Objective 9: Workload and well being	Schools create and share with the trust a clear process for supporting staff regarding workload related issues		All schools complete an annual well-being survey	Evaluate well-being survey to inform future actions		All schools complete an annual well-being survey	Evaluate well-being survey to inform future actions	Benchmark MAT provision compared with other similar Trusts	All schools complete an annual well-being survey
	Schools are clear of how to seek support from the Trust re workload related issues			Benchmark MAT provision compared with other similar Trusts					
Objective 10: Trust growth	JTMAT information for interested maintained schools and single academy trusts/small MATs is reviewed and promoted locally		JTMAT information for schools is reviewed and updated as appropriate	JTMAT 'user guide' reviewed.		JTMAT information for schools is reviewed and updated as appropriate	JTMAT 'user guide' reviewed.		JTMAT information for schools is reviewed and updated as appropriate
	JTMAT 'user guide' produced and issued								
	Discussions with RSCs (EM and WM) as appropriate re: Trust growth (on-going)								
	Seek growth funding from DfE initiatives (on-going)								
	Head of School Designate appointed for Fradley Park	Planning for Fradley Park Primary and Nursery School enters final stages.	Pupil and staff induction (cohort 1) for Fradley Park.	Fradley Park Primary and Nursery School opens	Staff and pupils identified for cohort 2 in Fradley Park		Fradley Park received Term 4 inspection.	Staff and pupils identified for cohort 3 in Fradley Park	

		Staff and pupils identified for cohort 1 in Fradley Park							
				Head of School Designate appointed for Rugeley John Taylor	Planning for Rugeley John Taylor enters final stages. Staff and pupils identified for cohort 1 in Rugeley John Taylor	Pupil and staff induction (cohort 1) for Rugeley John Taylor.	Rugeley John Taylor all-through school opens.	Staff and pupils identified for cohort 2 in Rugeley John Taylor	
							Head of School Designate appointed for Branston Locks	Planning for Branston Locks Primary and Nursery School enters final stages. Staff and pupils identified for cohort 1 in Branston Locks	Pupil and staff induction (cohort 1) for Branston Locks.

Objective 4: People Development

Objectives

1. To review and refine recruitment and induction processes
2. To implement a clear career progression pathway which outlines the offer and entitlement and informs the professional development pathway of staff throughout their career , promoting a “one Trust” culture
3. To ensure that a comprehensive professional development offer for teachers (supported by the MAT) is embedded within the TShub and Research school offer and accessed by colleagues across the Trust
4. To ensure professional development programmes and opportunities for leaders and aspiring leaders across the Trust are accessible via the TS hub and Research School and accessed by colleagues across the Trust
5. To promote and facilitate a strong culture of coaching to enhance the development of all teachers and leaders in all our schools and complement professional development programmes
6. To implement a common support programme which effectively helps teachers in need of support to improve their performance

Success Criteria

1. Common recruitment and induction practices are embedded
2. Newly appointed colleagues feedback positively on their recruitment and induction experience
3. 80% of ECT appointments come from the JT SCITT
4. Early Career Teachers successfully complete their induction
5. All schools use the career development pathway effectively and this is evidenced through performance management
6. The MAT audit evidences high levels of engagement in TS hub and Research School programmes and participants can articulate the impact of programmes on their practice
7. Leaders in our school are highly effective as evidenced through outcomes and reputation
8. Teachers and leaders take up promotions within the Trust
9. There are sufficient trained coaches in all our schools to enable all staff to have access to a coach
10. All schools use coaching to secure improvement and can evidence impact
11. Where staff need additional support schools can evidence how they have been supported to improve

People Development									
Objective	2021-2022			2022 - 2023			2023-2024		
	1	2	3	1	2	3	1	2	3
Objective 1: Recruitment, induction processes	Review current recruitment pack and process Update teaching post contracts to reflect focus on collaboration and evidence based practice	Launch annual recruitment campaign to attract external applicants		Review current recruitment pack and process	Launch annual recruitment campaign to attract external applicants		Review current recruitment pack and process	Launch annual recruitment campaign to attract external applicants	
	MAT induction event for new staff takes place Share adaptation of MAT induction check list with all schools	MAT induction event for new staff takes place	MAT induction event for new staff takes place	MAT induction event for new staff takes place Share adaptation of MAT induction check list with all schools	MAT induction event for new staff takes place	MAT induction event for new staff takes place	MAT induction event for new staff takes place Share adaptation of MAT induction check list with all schools	MAT induction event for new staff takes place	MAT induction event for new staff takes place
			MAT recruitment event takes place			MAT recruitment event takes place			MAT recruitment event takes place
			Evaluate and refine recruitment and new staff induction processes and events			Evaluate and refine recruitment and new staff induction processes and events			Evaluate and refine recruitment and new staff induction processes and events
	Share expectation re MAT representation on all Headteacher /Deputy/Business or officer manager appointments			Share expectation re MAT representation on all Headteacher /Deputy/Business or officer manager appointments			Share expectation re MAT representation on all Headteacher /Deputy/Business or officer manager appointments		
	Agree MAT process for exit interviews	MAT process for exit interviews implemented	MAT process for exit interviews implemented Exit interview documentation and process evaluated	MAT process for exit interviews implemented	MAT process for exit interviews implemented	MAT process for exit interviews implemented Exit interview documentation and process evaluated	MAT process for exit interviews implemented	MAT process for exit interviews implemented	MAT process for exit interviews implemented Exit interview documentation and process evaluated

			and any revisions shared			and any revisions shared			and any revisions shared
Objective 2: Career Progression Pathway	MAT supported professional development programmes shared			MAT supported professional development programmes shared			MAT supported professional development programmes shared		
	Revised career development pathway used in PM to inform professional development opportunities appropriate to career stage including opportunities for role shadowing within the MAT	Revised career development pathway used in interim PM	Annual evaluation and review of career development pathway document and revisions shared	Revised career development pathway used in PM to inform professional development opportunities appropriate to career stage including opportunities for role shadowing within the MAT	Revised career development pathway used in interim PM	Annual evaluation and review of career development pathway document and revisions shared	Revised career development pathway used in PM to inform professional development opportunities appropriate to career stage including opportunities for role shadowing within the MAT	Revised career development pathway used in interim PM	Annual evaluation and review of career development pathway document and revisions shared
	Revised career development pathway document embedded in recruitment documentation, navigable via school and MAT websites			Revised career development pathway document embedded in recruitment documentation, navigable via school and MAT websites			Revised career development pathway document embedded in recruitment documentation, navigable via school and MAT websites		MAT undertakes an end of year audit of engagement in professional development beyond a schools own setting
			MAT undertakes an end of year audit of engagement in professional development beyond a schools own setting			MAT undertakes an end of year audit of engagement in professional development beyond a schools own setting			MAT undertakes an end of year audit of engagement in professional development beyond a schools own setting
	All MAT schools have a SCITT trainee as appropriate	MAT schools offer trainee teachers interviews to support them in securing employment		All MAT schools have a SCITT trainee as appropriate	MAT schools offer trainee teachers interviews to support them in securing employment		All MAT schools have a SCITT trainee as appropriate	MAT schools offer trainee teachers interviews to support them in securing employment	
Objective 3a: Trainee teachers	Schools should ensure that where			Schools should ensure that where			Schools should ensure that where		

	teachers are undertaking			teachers are undertaking			teachers are undertaking		
	mentoring roles , this is referenced within their PM			mentoring roles , this is referenced within their PM			mentoring roles , this is referenced within their PM		
		JT SCITT keeps all schools informed re employment status of trainees and facilitate opportunities for school leaders to meet with trainees			JT SCITT keeps all schools informed re employment status of trainees and facilitate opportunities for school leaders to meet with trainees			JT SCITT keeps all schools informed re employment status of trainees and facilitate opportunities for school leaders to meet with trainees	
Objective 3b: Development of Early career Teachers	ECF lead meets with school mentors and Professional mentors to launch the ECF programme			ECF lead meets with school mentors and Professional mentors to launch the ECF programme			ECF lead meets with school mentors and Professional mentors to launch the ECF programme		
	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers	ECF lead monitors ECT and mentor engagement with the ECF programme and feeds back to Headteachers
	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support	ECF lead supports identified NQTs/NQT+1s form the MAT and provides individual support
			ECF lead updates the Achievement and Progress Committee on the progress of Early Career Teachers within the MAT			ECF lead updates the Achievement and Progress Committee on the progress of Early Career Teachers within the MAT			ECF lead updates the Achievement and Progress Committee on the progress of Early Career Teachers within the MAT

Objective 3c: Development of expert teachers	Expert teachers have access to coaching training		Teachers with a minimum of 4 years' experience identified as coaches or mentors for 2022 as appropriate	Expert teachers have access to coaching training		Teachers with a minimum of 4 years' experience identified as coaches or mentors for 2023 as appropriate	Expert teachers have access to coaching training		Teachers with a minimum of 4 years' experience identified as coaches or mentors for 2024 as appropriate
	Expert teachers access professional development opportunities via	Expert teachers access professional development	Expert teachers access professional development opportunities via the	Expert teachers access professional development opportunities via	Expert teachers access professional development opportunities via	Expert teachers access professional development opportunities via	Expert teachers access professional development opportunities via	Expert teachers access professional development opportunities via	Expert teachers access professional development opportunities via

	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	opportunities via the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy	the TS hub and Research school to enhance their teaching and maintain currency with general and subject specific pedagogy
	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others	Expert teachers engage in activities where they model effective practice , lead training and support others
Objective 4: Development of leaders and aspiring leaders	Agree leadership qualities to support consistency in terms of identifying colleagues suitable to progress to the leadership development pathway Outstanding expert teachers identified and supported to progress to the leadership pathway			Outstanding expert teachers identified and supported to progress to the leadership pathway			Outstanding expert teachers identified and supported to progress to the leadership pathway		

	Aspirant leaders access MAT supported aspiring leadership programmes activities within the TSHub and Research School			Aspirant leaders access MAT supported aspiring leadership programmes activities within the TSHub and Research School			Aspirant leaders access MAT supported aspiring leadership programmes activities within the TSHub and Research School		
	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor	Leaders new in post are assigned a buddy/mentor
	Leaders access specialist NPQs, NPQSL, NPQH and NPQEL as per the school's leadership development plan Align NPQ projects and assignments to		Leaders of schools and the trust arrange attendance at (other) school SLT meetings. Schedule created, and ongoing subsequently.	.	Leaders access specialist NPQs, NPQSL, NPQH and NPQEL as per the school's leadership development plan	Review and revise schedule of SLT meeting observations – and issue for 2023/4	.	Leaders access specialist NPQs, NPQSL, NPQH and NPQEL as per the school's leadership development plan	Review and revise schedule of SLT meeting observations – and issue for 2024/5

	school and Trust priorities. Create in-Trust network of NPQ participants.				Create new in-Trust network of NPQ participants.			Create new in-Trust network of NPQ participants.	
Objective 5 :Coaching	Coaching built into the careers development pathway	MAT agrees criteria for approved external coaches	MAT supports colleagues seeking enhanced coaching qualifications in 2022						
	Coaching training accessible for all in line with the Career Development pathway			Coaching training accessible for all in line with the Career Development pathway			Coaching training accessible for all in line with the Career Development pathway		
	All staff have access to a coach			All staff have access to a coach			All staff have access to a coach		
Objective 6 : Support programme	Audit of school informal process re: working staff in need of support to deliver effective lessons	Agree a common process for informally supporting staff	Common process of informal support is implemented			Review of the informal process re: working with staff in need of support in the classroom	Revised informal process of support implemented		

Priority 5: Infrastructure and support:

Objectives

- To source and purchase a range of online support packages to support leadership and governance across our schools
- Estates Management to deliver a number of programmes relating to capital investment, related service contracts and health and safety
- To implement a dedicated finance budget and salary planning package to facilitate the budget setting process across schools
- To introduce the use of an IT benchmarking tool
- To ensure that growth within the MAT central team supports change and improvement across and within schools
- To offer an impressive package of traded services, in conjunction with its Research School and Teaching School Hub, and deliver high quality school improvement, financial services, IT support, and other packages to schools and MATs
- To equip all members of our community with the necessary knowledge, skills and tools to ensure compliance with Data Protection Act (GDPR/DPA) and the latest cyber security guidance.

Success Criteria

1. Key organisational structures and architecture enable school communities to function efficiently, effectively, compliantly and coherently – within and across our schools.
2. A forward thinking three year cycle of capital investment will be implemented to improve the condition of school buildings with due regard to sustainability principles
3. Aligned estates related service contracts achieve best value for money and create resource efficiencies
4. All schools can demonstrate high levels of health and safety conformity
5. As a result of a dedicated finance budget and salary planning package schools and the Trust benefit from:
 - Increased transparency of the budget setting process
 - A quicker and less complex process for school and Trust staff
 - More precise/detailed budget and salary information
 - Improved integration of strategic and operational planning
 - Improved integration with Trust finance package and ESFA reporting requirements/tools
6. An IT benchmarking tool effectively informs budget, purchasing, IT development plans and future strategy
7. The Trust can evidence impact of how creating capacity within the central team though for example secondments, subject specific posts, project management opportunities, Ed Psych services and reconfigured IT support supports school improvement
8. An impressive package of traded services offered by the Trust in conjunction with the TS hub and Research School is accessed by other schools and MATs
9. All schools are GDPR/DPA compliant

Objective 5 – Infrastructure and Support

Actions	2021-2022			2022 - 2023			2023-2024		
	1	2	3	1	2	3	1	2	3
Objective 1: (Purchased information repository)	Trust purchases a range of online support resource packages (particularly for leadership and governance), advising schools of their content and how to access.	Access from the Trust core team – for its use and that of schools - is monitored.	Feedback is sought from schools and core team re: usefulness of differing packages. Contracts are extended or terminated accordingly.	Continue to monitor usage and value to trust and schools.				Scan the market for new or amended packages that may augment or replace those already used by the Trust.	Make purchases, advise schools of content and how to access
(Safeguarding package)	Trust to purchase online safeguarding package for all its schools – and ensure installation and training has been undertaken in summer 2021	First report to the Board on Trust-wide safeguarding data using collation tool. Provide support for LGB link governors in how the system works	Review usage via DSLs and identify best practice for further training and development. Trust-wide Training Day to include drop-in surgery re: safeguarding package	Continue to monitor usage and value to trust and schools.					
(Governance portal)	New governance portal used by all LGBs and Trust Board (following pilots in 2020-21) 'How to' video guidance shared to encourage effective usage. All new governors view as part of induction pack.	Gain feedback from Exec. Group, School Representation Group, Clerks' Forum, and LGBs/Trust Board re: usage.	Review usage and effectiveness. Identify best practice and innovation, and share across Trust. Identify less effective practice and take remedial measures re: training and monitoring	Continue to refine, adapt and add content to the portal.		Highlight developments via governance conference Consider any commercial opportunities or wider sharing beyond the Trust	Continue to refine, adapt and add content to the portal. Consider any commercial opportunities or wider sharing beyond the Trust		
(JTMAT online repository)	Online repository is developed between IT support colleagues and school improvement leads, consulting with schools throughout.	Promoted to schools and expanded with migration of resources from elsewhere.	Featured within the Trust-wide training day – training on uploading/downloading, surgery for queries, ideas forum for further development.	Further develop and innovate, monitoring usage and evaluating value to schools. Report to the Trust regularly via Achievement and Progress Committee.					

(SchoolIP developments)	Trust Strategic Plan is monitored and reviewed by the Trust Board using SchoolIP. Framework of Effectiveness is issued to schools on SchoolIP – with training and support given.	Gain feedback from the Board re: 'live' access to Strategic Plan. Collate Framework of Effectiveness responses and issue to Achievement and Progress	Engage in further dialogue with SchoolIP over further opportunities for development. Trust-wide training day includes showcase on how to use more advanced packages and functions on SchoolIP	Continue to develop and refine usage – Performance Management, self-evaluation and improvement planning. Engage in pilot and testing opportunities, and feed in further innovations for development.					
Objective 2: Estates management (Plan and program capital investment)	Carry out post program review Update asset management plans with completed capital works to sites	Implementation of physical works, review of asset information to inform future program plan following SCA Works	Ensure the current year's program is scheduled and individual projects procured	Write specifications and tender works. Implementation of physical works	Carry out post program review Update asset management plans with completed capital works to sites	Review of asset information to inform future 3 year plan	Implement physical works for year 1 of new plan	Carry out post program review Update asset management plans with completed capital works to sites	Review of asset information to inform future year plan
(Align estates related service contracts)	Carry out review of potential service contracts for procurement and savings	Carry out benchmarking and tender exercises for relevant services	Formulate short to medium term procurement plan and contract register	Identify contracts to bring into Academy year from fiscal year on long term arrangements	Understand contracts to be in place to serve new schools especially specialist provision	Tender or quote Annual contracts for September start	Benchmark existing contracts for good value.	Monitor and audit service contracts providing position statement of success	Re-assess Procurement plan and determine contracts that could benefit from long term agreements
(Promote a culture of health and safety and risk management)	Assist each school with the review and audit of H&S. Procure standard approach to H&S training	Create register of risk assessments carry out review of relevant H&S policies.	Assess H&S training needs across the Trust, Implement a standard training list for all employees	Create a program of "internal" H&S" pre-audit inspections for H&S compliance. Investigate platform for H&S	Audit specific Building Estates building compliance with service providers	Continue to assist Schools with external H&S audits and standard approach to RA	Assess the potential of undertaking procurement of external safety services	Create a program of "internal" H&S" pre-audit inspections for H&S compliance	Assess H&S update training needs across the Trust

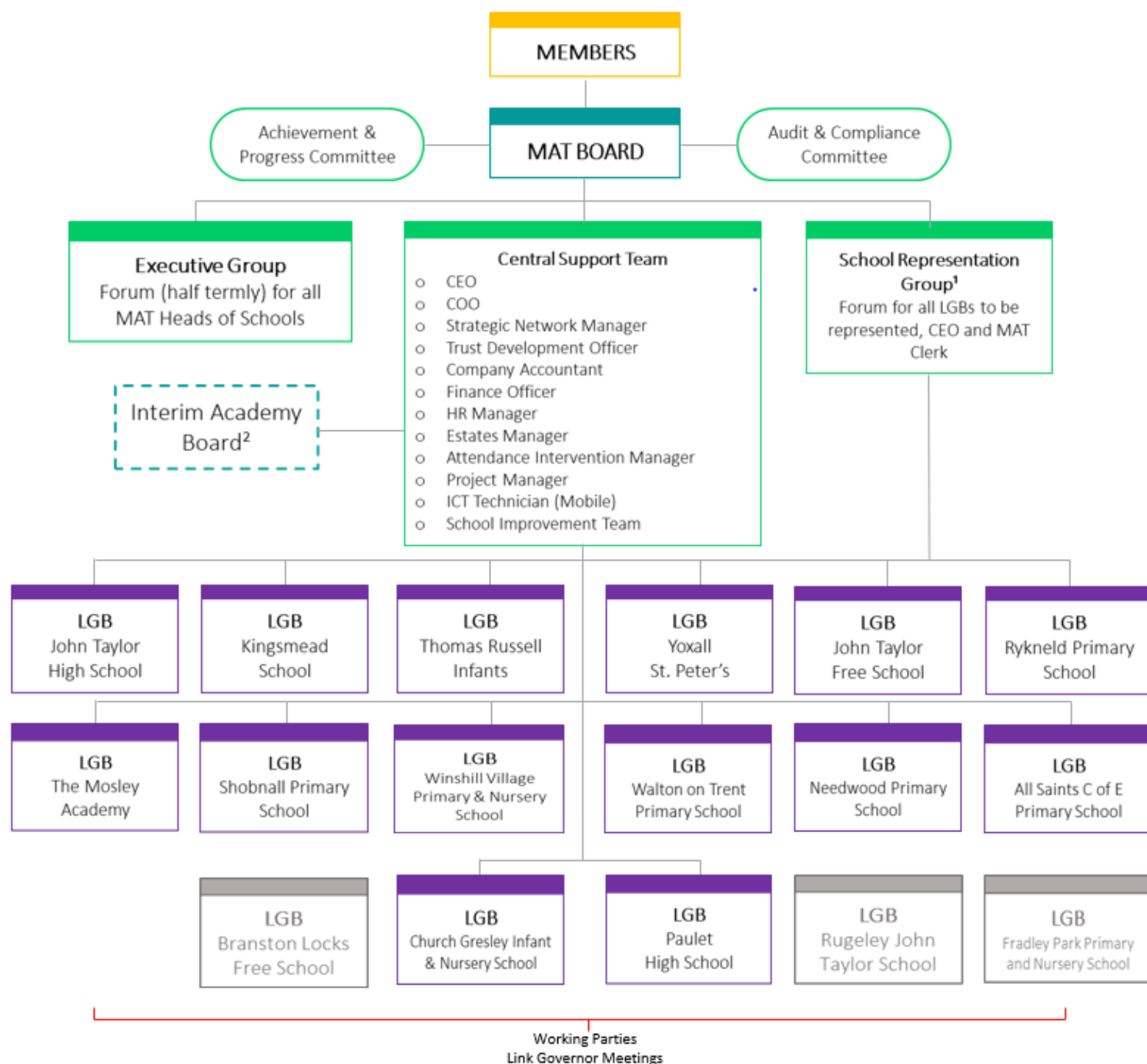
Objective 3: Finance modeller	Product options appraisal / Tender issued/product installed summer 2021. Transfer of 2021 budget info to new package.	Transfer of all 2021-22 salary information to new system. Start using for Payroll checking and ESFA returns (BFRO)	Refresher training if required. Information rolled forward and 2022-25 budgets set using new system. Review of product.	Install at FPS. Training for new school staff and refresher training for other staff as required.	Continued use of system - developed to aid budget monitoring and reporting information.	Refresher training if required. Information rolled forward and 2023-26 budgets set. Review of product.	Install at RJT. Training for new school staff and refresher training for other staff as required.	Continued use of system - developed to aid budget monitoring and reporting information	Refresher training if required. Information rolled forward and 2024-27 budgets set. Review of product.
Objective 4: IT Benchmarking	Review undertaken to assess access to learning material and core programs across schools. Review software/services such as connectivity and MIS are fit for purpose and procure if required. Review Microsoft Agreements to ensure appropriate licensing is available to support further development.	Report finding of the review to schools via the Executive Group. Bespoke school level plans and support are established to migrate content from locally accessible to resources to universal access (cloud).	Schools are supported in the transition from locally accessible to resources to universal access (cloud).	Review undertaken to assess access to learning material and core programs across schools. Bespoke school level plans and support are reviewed and updated to migrate content from locally accessible to resources to universal access (cloud). Review Microsoft Agreements to ensure appropriate licensing is available to support further development.	Review undertaken to assess access to learning material and core programs across schools.	Continue to populate and drive schools towards an online platform to ensure there is universal access to learning material which is device agnostic. Review software/services such as connectivity and MIS are fit for purpose and procure if required.			

Objective 5: Growth of Trust core team	Review structures in the context of growth – free schools, growing NORs in current schools, TS Hub etc. – and identify capacity and succession risks.	Report to the Board findings of structural review, amend recommendations accordingly.	Implement recommendations where costs and recruitment opportunities permit.		Review structures in the context of the Trust's position by this stage.	Report to the Board findings of structural review, amend recommendations accordingly.	Implement recommendations where costs and recruitment opportunities permit.
	Undertake benchmarking and comparison activities.		Adjust organisational charts and documentation. Induct new staff as appropriate.		Undertake benchmarking and comparison activities.		Adjust organisational charts and documentation. Induct new staff as appropriate.

Objective 6: Traded services	Identify and engage with other Trusts and providers who have extensive traded services, in order to develop JTMA T’s capacity to deliver		Review all services offered by the Trust to its schools for potential of wider impact. Develop a prospectus of services if appropriate. Re-visit ‘associate member’ concept.			Review any and all developments.	Identify and visit providers with extensive traded services.		Prepare for any revisions that may be implemented in the forthcoming Strategic Plan for the Trust, 2024-27
Objective 7: Data Protection (DP) & Cyber Security (CS)	Review current structures for reporting and managing incidents (DP/CS) Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats	Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats Report findings and any recommendations for improvement to the Board	Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats Implement any recommendations Provide the Board with a summary of incidents & applicable audits in relation to DP & CS	Continue to embed training & procedures across all schools Implement new security features as a consequence of renewing our Microsoft Agreement Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats			Begin the Cyber Security Essentials accreditation process. Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats Review current structures for reporting and managing incidents (DP/CS)	Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats Report findings and any recommendations for improvement to the Board	Publish a termly newsletter (or add to JTMA T Bulletin) in relation to DP & CS to ensure all stakeholders engage with current threats Implement any recommendations Cyber Security Essentials mark awarded to the Trust Provide the Board with a summary of incidents & applicable audits in relation to DP & CS
						Provide the Board with a summary of incidents & applicable audits in relation to DP & CS			

Appendix A - MAT Organisation Structure

Current Position



¹Two non-executive Directors approved from this group to serve fixed term tenure on MAT Board. Constituted upon addition of next School into Trust.

²Structures established for school requiring governance outside LGB structure (responsible directly to MAT Board).

Appendix B - John Taylor MAT Board Terms of Reference

1. Introduction

1.1 Vision and Values

What we Value:

'We believe in the power of education to improve lives – and the world'

We are driven to ensure that our communities can realise their true potential through learning. This is our mission. To that end, we provide the experiences, resources, structures and systems to enable all to engage, all to progress, all to achieve.

Through all that our Multi-Academy Trust provides, we extend our mission beyond the school in which it originated. Our core values are articulated here:

- **Our commitment to ensure learning is at the heart of all we do**
Keeping “the main thing, the main thing” – prioritising our people, time, energy and funding to the improvement of the educational experience – both formal and informal – we provide.
- **A passion for excellence**
Only comparing ourselves with the best. When finding it, seeking to match and then surpass it.
- **Restlessness and curiosity**
Looking for opportunity to be involved and to learn from new experiences.
- **Courage to innovate**
Leading change – in teaching and learning, curriculum development, organisational structures.
- **Tenacity and resilience**
Holding to our mission in times of turbulence, and remaining resolute until we achieve what we set out to do.
- **Collegiality**
Listening to others, sharing with others, learning from others.

Ethos and mission statement

Each academy will become an outstanding school and work collaboratively with other schools within the MAT for mutual benefit and improvement. Schools will also maintain good working relationships with other local schools, community organisations and the local authority to ensure they fully serve their local communities.

John Taylor MAT Board role and purpose

- 1.2 As a charity and company limited by guarantee, John Taylor MAT (the “Company”) is governed by a board of directors (the “directors”) who are responsible for, and oversee, the management and administration of the trust and the academies run by the trust.

- 1.3 The directors are accountable to the Department for Education (DfE) and external government agencies, including the Charity Commission, for the quality of the education they provide and the effective use of the associated academy funding. They are required to have systems in place through which they can assure themselves of quality, financial probity, safety and good practice.
- 1.4 These terms of reference explain the ways in which the board fulfils its responsibilities for the leadership and management of the trust. They have been adopted by the board in accordance with the trust's Articles of Association (the Articles) and should be read in conjunction with those Articles.

2. Directors' powers and responsibilities

- 2.1 The trust board is responsible for the strategic direction, broad policy framework and oversight of the trust and all its academies in order to ensure that John Taylor MAT's vision and values underpin the work of the trust and the trust and its direction of travel.
The board should also ensure the solvency of the trust, safeguarding its assets and delivering its charitable outcomes. The board oversees the performance of the trust, including the management of risk. This is largely exercised through strategic planning and the setting of policy. It is through business planning, monitoring of budgets, performance management, the setting of standards and the implementation of quality assurance processes. The directors have the power to direct change where performance falls short of expectations of good to outstanding schools.
- 2.3 The directors have a duty to act in the fulfilment of the trust's objects.
They are:
"to advance for the public benefit education in the United Kingdom, in particular but without prejudice to the generality of the foregoing, by establishing, maintaining, carrying on, managing and developing schools offering a broad and balanced curriculum. ("the mainstream Academies") or educational institutions which are principally concerned with providing full-time or part-time education for children of compulsory school age who, by reason of illness, exclusion from school or otherwise, may not for any period receive suitable education unless alternative provision is made for them ("the alternative provision Academies") or 16 to 19 Academies offering a curriculum appropriate to the needs of its students ("the 16 to 19 Academies") or school specially organised to make special educational provision for pupils with Special Educational Needs ("the Special Academies")
- 2.4 Directors will have regard to the interests of all the academies for which the trust is responsible in deciding and implementing trust-wide policies or exercising any authority in respect of an academy.
- 2.5 The trust is the sole legal entity for all central operations and for the academies in the trust. As such, on behalf of the sponsor and as detailed in the Articles and Master Funding Agreement, the trust board has sole responsibility for strategic decision making in the trust. On behalf of the trust, the board can decide to delegate some (but not all) of its decision making powers to board committees, including sub-committees of the main board and local governing bodies (LGBs) constituted for the individual academies in the trust. The extent of delegation will be determined by school effectiveness and the practical necessities of good governance.

- 2.6 These delegations must take full account of the trust's legal responsibilities and ensure effective risk management. The details of delegated decision making are described in the Terms of Reference for Local Governing Bodies (LGBs) further on in this document.
- 2.7 The Chief Executive Officer will:
- Be responsible to the Trust board for leading and managing the Trust, creating and articulating an effective vision and strategy which meets its needs as it evolves.
 - Oversee the delivery of a culture of educational improvement; raising performance, enhancing teaching and learning and ensuring high levels of quality assurance.
 - Be accountable for the overall financial viability and sustainability of the Trust and for the development of relationships with key internal and external stakeholders for the benefit of its students and the wider communities.

3. Membership

- 3.1 The directors are appointed by the John Taylor MAT Members on behalf of the trust.
- 3.3 The quorum for trust board meetings will be three or a third whichever is the greater.
- 3.4 Directors are appointed because of the range of skills and expertise they can bring to help to realise the MAT's vision and values for the trust, enhance the effective strategic leadership and management of the trust, and represent stakeholder interest within the trust effectively.
- 3.5 The trust shall ensure representation on the Board from the MAT's LGBs through the appointment of two directors from their number in order to ensure opportunity is shared across all MAT schools, the tenure of LGB representation directors will a maximum of four years.

4. Appointment of chair and vice-chair

- 4.1 The chair of the trust board should be appointed by their fellow directors of the Board. S/he is eligible for re-election.
- 4.2 The vice-chair of the trust board and chairs of established committees are elected by the trust board. The Vice Chair holds office for one year and is eligible for re-election. The Chairs of Committees are appointed for such term as the Trust Board may decide.
- 4.3 If the chair and vice-chair are absent from any meeting of the board, the members shall choose one of their number to act as chair for the meeting.

5. Meetings

- 5.1 The trust board shall meet at least three times in each school year. Extraordinary meetings may be called at short notice if there are urgent issues that need board discussion and/or a board decision. Committees will meet as defined by their individual Terms of Reference.
- 5.2 The trust will appoint a Clerk to the board.

6. Terms of Reference

The duties of the trust board shall be:

Setting the strategic direction

- 6.1 to ensure that John Taylor MAT's vision and values underpin the way in which the trust works and relationships within the trust;

- 6.2 to determine the educational character, ethos and mission of the trust;
- 6.3 to approve the trust strategic plan and review annually;
- 6.4 Terms of reference for the John Taylor MAT will be reviewed by the John Taylor MAT board on an annual basis. All amendments to the John Taylor MAT Board terms of reference will require a special resolution i.e. 75% voting in favour. All changes to the local governing body terms of reference will also be made by the John Taylor MAT Board and, if approved would be amended in the terms of reference for all local governing bodies within the John Taylor MAT. All terms of reference will be reviewed by both the John Taylor MAT Board and the local governing bodies annually.

Ensuring high standards of achievement and improved performance

- 6.4 to ensure that all academies in the trust are effectively challenged and supported to maximise outcomes of children and young people who attend trust academies through target-setting and other mechanisms;
- 6.5 to receive reports at every board meeting in order to review regularly outcomes and impact against key performance indicators as identified in the trust's strategic plan;
- 6.6 to challenge and support the trust's senior officers and academy leaders to achieve best value in terms of impact, outcomes, quality and cost;

Ensuring strong and robust governance

- 6.7 to ensure compliance with the trust's duties under company law and charity law and agreements made with the Department for Education (DfE) including Master Funding Agreement and supplemental Funding Agreements;
- 6.8 to establish an effective risk management process and monitor its Implementation;
- 6.9 to ensure the continued charitable status of the trust;
- 6.10 to approve the trust board's terms of reference and keep them under regular review;
- 6.11 to approve the trust's accountability framework and keep it under regular review;
- 6.12 to approve the terms of reference of the Board committees and keep them under regular review;
- 6.13 to approve the trust's policy framework that identifies responsibilities for approving specific policies and keeping this under regular review;
- 6.14 to take timely action to address decisions for which there is a legal requirement for board approval;
- 6.15 to ensure effective consultation and communication with all constituent parts of the trust;
- 6.16 to review its own effectiveness regularly and agree appropriate actions to improve its performance;

Ensuring sound financial practices

- 6.17 to approve the trust's annual budget and keep it under regular review by receiving a financial report at every board meeting;
- 6.18 to approve each trust academy's bottom line annual budget, review annually and endorse plans to address identified over or underspends;
- 6.19 to agree the scheme of financial delegation to trust academies and review this annually;

- 6.20 to receive the annual report from the trust's auditors and take the appropriate actions to respond positively to any recommendations;

Becoming the employer of choice

- 6.21 to approve trust wide employment policies for all trust employees;
- 6.22 to appoint the CEO, Heads of Schools and members of the Trust Executive Team and endorse the appointment of all other staff;

Ensuring a secure health and safety environment

- 6.23 to approve the trust's health and safety policy and review its implementation annually;

Ensuring effective child protection and safeguarding

- 6.24 to approve the trust's safeguarding policy and keep it under regular review;
- 6.25 to receive an annual report on the effectiveness of safeguarding practices in trust academies and within the trust;

Acting as the admissions authority

- 6.26 as the admissions authority for all trust academies, determine the admissions arrangements for all academies and review annually;

7. Reporting procedures

- 7.1 The clerk to the trust board shall circulate minutes of the meetings, the agenda and any associated papers for forthcoming meetings at least seven working days before the date of the board meeting.

8. Audit

- 8.1 In order to ensure compliance with all of the above, a separate Audit Committee shall be convened in line with statutory requirements and current best practice.

Appendix C – Audit & Compliance Committee Terms of Reference

1. Terms of Reference

John Taylor Multi Academy Trust has established an Audit and Compliance committee to maintain an oversight of the Academy Trust's governance, compliance, risk management, internal control and value for money framework. This oversight extends to all schools within the Trust and includes an oversight of all information and/or returns that affect funding. The Committee will report its findings annually to the MAT Board as a critical element of the Trust's annual reporting requirements. The Audit and Compliance committee has no executive powers or operational responsibilities/duties.

- a) The Audit and Compliance committee is authorised to obtain outside legal or independent professional advice as it considers necessary, normally in consultation with the Chair of the MAT Board. The Trust Board may co-opt one additional member to the Audit and Compliance committee on the basis of skills and/or experience.
- b) The Chair will be a Director of the MAT Board who will be appointed annually by the MAT Board.
- c) In the event of the absence of the Chair a member of the Audit and Compliance committee will be nominated by the committee to Chair the meeting.
- d) The quorum for the Audit and Compliance committee will be **three** non-executive Directors.
- e) Meetings should take place no less than termly.

2. Specific Responsibilities

- a) To recommend a Scheme of Delegation for adoption by the Trust Board, established as a formal schedule that distinguishes between matters reserved exclusively for the Directors and Members approval or decision, and matters delegated to LGB committees and individuals.
- b) To make recommendation to the Trust Board regarding the appointment of external auditors.
- c) To review the external auditors annual planning document and approve the planned audit approach.
- d) To undertake annual scrutiny of internal compliance controls that are in place across the Trust and its schools.
- e) To review the draft financial statements and audit management report and to recommend approval of the audited financial statements to the Trust Board prior to submission to the EFA by 31 December.
- f) To agree an annual programme of internal audit checks.
- g) To receive internal audit reports on the use of resources, systems of internal financial control, and discharge of financial responsibilities and report such to the Trust Board and the ESFA.

- h) To ensure compliance and effectiveness of the risk management process, to review the Trust's Risk Register itself and recommend changes to/amendments of both the Register and the processes to the Trust Board.
- i) To receive, note and disseminate across the JTMAT, new guidelines on best practice in financial and governance matters.
- j) To review annually JTMAT levels of financial autonomy delegated to each of its academies and make recommendations to the Trust Board.
- k) Annual review of the JTMAT Financial Procedures Administration and Control handbook and its appendices.
- l) To review all JTMAT policies and appendices as they fall due and make recommendations to the MAT board for the adoption of any necessary amendments/additions.
- m) To forward to the MAT Board for their consideration the latest version of the Trust's Reserves Policy upon review.
- n) To make recommendation to the MAT Board regarding the appropriate level of JTMAT uncommitted reserves.
- o) Informing the Trust Board if it suspects any irregularity affecting resources and ensuring that all allegations of fraud or irregularity are managed and investigated appropriately.

Appendix D – Achievement and Progress Committee Terms of Reference

John Taylor Multi Academy Trust has established an Achievement and Progress Committee to maintain an oversight of the Academy Trust's performance regarding its core purpose: the delivery of high quality achievement and progress outcomes for all its children. This oversight extends to all schools within the Trust and includes an oversight of all information and/or returns that affect the educational performance outcomes of children at all stages of their education within the Trust's schools. The Committee will report its findings annually to the MAT Board as a critical element of the Trust's annual reporting requirements. The Achievement and Progress Committee has no executive powers or operational responsibilities/duties.

- a) The Achievement and Progress Committee is authorised to obtain independent professional advice as it considers necessary, normally in consultation with the Chair of the MAT Board and the CEO. The Trust Board may co-opt additional members to the Achievement and Progress committee on the basis of skills and/or experience.
- b) The Chair will be a Director of the MAT Board who will be appointed annually by the MAT Board.
- c) In the event of the absence of the Chair a member of the Achievement and Progress Committee will be nominated by the committee to Chair the meeting.
- d) The quorum for the Achievement and Progress Committee will be three non-executive Directors.

2. Specific Responsibilities

- a) To provide support, challenge and scrutiny on behalf of the Trust Board regarding the standards of achievement and progress of children in all Trust schools – both reported and current – in order that the Board has clarity over the effectiveness of the Trust and each of its schools in the delivery of high quality provision.
- b) To report to the Trust Board areas of high performance (at school, learner group and even individual child level where appropriate) and areas of concern (at school and learner group level).
- c) To scrutinise investment in and deployment of resources relating to core activities of teaching and learning, assessment and curriculum design and delivery.
- d) To monitor the effectiveness of school-level systems and activities and support schools' local governing bodies in the discharge of their responsibilities over the monitoring of standards.
- e) To receive presentations and reports from senior leaders of the Trust and its schools relating to achievement and progress of children within our schools.
- f) To ensure equality of opportunity and inclusion across the Trust, with particular emphasis on potentially vulnerable children and groups – children with special educational needs, children from disadvantaged backgrounds, children with English as an additional language, and the most able.

- g) To ratify the categorisations of schools within the Trust as articulated in the Trust's School Improvement Strategy and receive representations and arbitrate in the event of a dispute over such categorisation.
- h) To receive, note and ensure the dissemination across the JTMAT of new changes relating to accountability measures for pupil performance or statutory returns.
- i) To receive, note and scrutinise external reports relating to achievement and progress of children at Trust schools. This includes Ofsted inspection reports, SIAMS inspection reports, Pupil Premium Reviews and other such documents. The Committee shall then provide feedback via the Chair to the Trust Board.
- j) To review all JTMAT policies and appendices relating to achievement and progress (and the teaching and learning, assessment and curriculum provision that underpins it) as they fall due and make recommendations to the MAT board for the adoption of any necessary amendments/additions.
- k) Informing the Trust Board if it suspects any irregularity affecting the discharging of the Trust's responsibilities over examinations and assessment of standards (e.g. class work moderation) and ensuring that all allegations of fraud or irregularity are managed and investigated by the Trust effectively.

Appendix E – School Representation Group Terms of Reference

1.0 Roles and Remits of the School Representation Group within John Taylor MAT

- 1.1 Legal responsibility for the academies lies with the Company (John Taylor MAT). It is governed by the Directors, who rely on advice and support from academy Local Governing Bodies (LGBs), particularly (but not limited to) strategic planning and the specific matters delegated under these Terms of Reference.
- 1.2 With reference to the provisions of LGB Terms of Reference (section 1.2), the Directors delegate the running of each academy to the Local Governing Body, and duties are specified therein.
- 1.3 It is recognised that in order to function efficiently and coherently, there must be clarity of communication operationally, and a shared vision strategically at all levels of Trust governance. In this context, the School Representation Group serves a clear purpose: to act as an organisational conduit connecting all Trust academy LGBs structurally with the MAT Board. It has not statutory role or decision making authority.

2.0 Terms of Reference:

The School Representation Group is a:

- 2.1 Consultative forum, in which agendas for forthcoming LGB and MAT meetings will be shared, and discussed in terms of what the MAT envisages re: proposed actions or decisions by LGBs, and local issues relating to the agenda items conveyed by LGBs. Where known, LGBs will share with the Group any local items that will feature on their LGB agendas in the next cycle of meetings.
- 2.2 Communication channel, at which the minutes of the MAT Board and LGBs can be discussed transparently, ensuring clarity for those not present at other meetings within the MAT organisation.
- 2.3 Developmental group, with opportunities for members to show their innovative use of MAT governance tools such as the Office365 Portal, and The Key. It is also the forum at which ideas for cross-academy governance improvement – training, the MAT Governance Conference etc. – will be discussed and shared.
- 2.4 Networking mechanism, in which governors can share their insights of governance and their school contexts with one another – for the benefit of the school with which they are associated and its LGB.

3.0 Membership:

- 3.1 Each LGB is entitled to send up to two governors to the Group for each meeting. Each LGB should nominate two colleagues annually to represent the school and make every effort that at least one attends each meeting.
- 3.2 The CEO, and the Clerk to the MAT Board, will also be in attendance at each meeting.
- 3.3 Any Directors and Members of the MAT are entitled, and encouraged, to attend.
- 3.4 Quorum is not applicable to the group, and it has no statutory role or decision-making authority. The School Representation Group will therefore meet irrespective of numbers able to attend.
- 3.5 The Committee will meet half termly (six times per year), aligned to the meeting cycles of LGBs and the MAT Board.

4.0 Review:

- 4.1 The School Representation Group will annually review its own performance and seek continual improvement in the undertaking of its duties.
- 4.2 Terms of Reference for the School Representation Group will be reviewed on an annual basis at the first meeting of the academic year. The terms of reference will be submitted to the John Taylor MAT Board for approval. All amendments to School Representation Group Terms of Reference will require a special resolution by the John Taylor MAT Board i.e. 75% voting in favour.

Appendix F – Executive Group Terms of Reference

1.0 Roles and Remits of the Executive Group within John Taylor MAT

- 1.1 Legal responsibility for the Academy lies with the Company (John Taylor MAT). It is governed by the Directors, who rely on the leadership and management acumen of senior employees of the Trust – operating at MAT-wide and academy levels – to deliver the Trust’s vision and objectives as articulated in its Strategic Plan and via the delegated authority of its Local Governing Bodies.
- 1.2 In the context of 1.1 above, it is essential that senior leaders within the Trust’s academies are structurally connected with the Trust’s own executive team, and vice versa. The purpose of the Executive Group is therefore to:
 - 1.2.1 Provide an efficient and effective mechanism for the aims and objectives of John Taylor MAT, and its consequent strategic direction, to be communicated to the leadership personnel in academies pivotal to our success;
 - 1.2.2 Enable school leaders (Headteachers and Heads of School) to provide input to the Trust’s strategy through the review of its objectives, key performance indicators, and strategies as articulated in the Trust’s Strategic Plan;
 - 1.2.3 Ensure consistency of implementation and approach, and clarity of purpose across all senior leaders at Trust and school level;
 - 1.2.4 Enhance opportunities for collaboration and networking whereby ideas and concerns can be shared by leaders with their peers in a climate of mutual support and trust;
 - 1.2.5 Provide access to, and for, all school leaders for Trust personnel working across our schools – including the Chief Operating Officer, Strategic Network Manager, Clerk to the MAT Board, school improvement partners and other colleagues on an agenda-driven basis;
 - 1.2.6 Input into Trust-wide operational matters such as the procurement of services and the development of Trust infrastructure by articulating the impact – positive and negative – of such developments in their own school context.
 - 1.2.7 Consider recruitment, retention and staff development needs – including opportunities for secondments and shadowing of colleagues across our schools.

The above set of responsibilities can and will be amended by directors if the Board view this as necessary to secure the improvement of leadership within John Taylor MAT.

2.0 Terms of Reference:

- 2.1 The Executive Group does not possess explicit authority, and works in a consultative, collaborative, supportive and advisory capacity only.
- 2.2 The Executive Group shall meet half termly but may be called for an extraordinary meeting should circumstances require it.
- 2.3 The Chief Executive Officer (CEO) will act as Chair. In their absence, the Chair shall be the senior leader from the school hosting the meeting (see 2.4 below).
- 2.4 Each Executive Group meeting will take place at one of the Trust’s schools, and the leader of the host school is encouraged to share with the group an element of effective practice that they regard as valuable for others to appreciate.

- 2.5 School leaders should make every reasonable effort to attend. Deputisation by a colleague is not permitted in order to retain the dynamic of the group and enable fluidity of strategy. In the event of unavoidable absence, apologies should be communicated to the Clerk to the MAT Board at the earliest opportunity. Feedback on the meeting's content and outcomes should be sought from the Head of the school that hosted the meeting.
- 2.6 Agendas will be circulated in advance, and actions will be recorded and distributed following the meeting. These will also be uploaded to the Trust portal, where all members of the Group can access them online.
- 2.7 The Executive Group will review these Terms of Reference annually, with any proposed revisions, additions, or deletions forwarded to the MAT Board by the CEO for its consideration. Any such changes would require the support of 75% of meeting attendees from both Trust-wide and school leaders.

Appendix G – LGB Amending Managing Organising Committee Terms of Reference

Roles and Remits of the Local Governing Body within John Taylor MAT

- 1.1 Legal responsibility for the Academy lies with the Company (John Taylor MAT). It is governed by the Directors, who rely on advice and support from the Academy Local Governing Bodies, particularly (but not limited to) strategic planning and the specific matters delegated under these Terms of Reference.
- 1.2 Subject to the provisions of these Terms of Reference, the Companies Act 2006, conditions relating to our charitable status, the Articles and to any further directions given by the Directors, the business of each Academy shall be managed by the Local Governing Body who may exercise all the powers of the Company. The Directors delegate the running of each Academy to the Local Governing Body and specifically the following duties:
 - 1.2.1 articulating the aims and objectives of John Taylor MAT in the local context of the Academy;
 - 1.2.2 determining the execution of the educational vision of John Taylor MAT in consultation with the Directors, including, but without limitation, determination of the Academy improvement plan;
 - 1.2.3 ensuring compliance with the Terms of Reference under which the Academy is governed and subsequent amendments;
 - 1.2.4 accepting receipt of the Academy annual funding;
 - 1.2.5 compliance with the Academy Financial Handbook (or any subsequent set of financial requirements imposed by the Department for Education) including determination and implementation of procurement policies for the Academy;
 - 1.2.6 oversight with regard to the finances the Academy, including, but without limitation, responsibility for compliance with the financial and accounting requirements detailed within the Funding Agreements;
 - 1.2.7 determination of the corporate planning and strategy for the Academy in consultation with the Directors;
 - 1.2.8 the determination, after consultation with the Directors, of the extent of the services provided to the Academy by the Company and how the costs should be allocated;
 - 1.2.9 determining the cash flow policy for the Academy and monitoring income and expenditure for the Academy;
 - 1.2.10 determining financial and reporting targets for the Academy;
 - 1.2.11 consideration of the Academy's required funding and support to the Directors in connection with the agreement with the DfE of the Academy's budget;
 - 1.2.12 monitoring and reviewing expenditure on a regular basis and ensure compliance with the overall financial plan for the Academy;
 - 1.2.13 maintenance of proper accounting records and the preparation of income and expenditure and balance sheets as required;
 - 1.2.14 maintenance of the Academy estate in accordance with the guidelines established by the Company;
 - 1.2.15 maintaining a fixed asset register;
 - 1.2.16 notifying the Company of any changes to fixed assets used by the Academy;
 - 1.2.17 responsibility for the implementation of human resource policies and procedures and terms and conditions of service;
 - 1.2.18 the appointment, job description, appraisal and dismissal of all members of staff of the Academy – although in conjunction with the Directors with regard to holders of TLR1s, Grade 8 or above (support staff) or LG pay spine - but the remuneration of every

- member of staff and their terms of service shall be within the parameters from time to time established by the Directors;
- 1.2.19 implementation of the admissions policy and arrangements for the Academy in accordance with admissions law and DfE codes of practice;
 - 1.2.20 implementation of actions required to comply with statutory regulations and the Funding Agreements.
 - 1.2.21 each Local Governing Body will elect from its number a Chair and a Vice Chair of the LGB. These are positions to be elected annually and are subject to formal ratification from the Trust Board prior to commencement via the final LGB meeting (meeting 6) of the year preceding their tenure. Chairs and Vice Chairs of LGBs can chair and vice chair one or both of the Academy's Committees (see 1.2.23 and 1.2.24) but are not obligated to

The above set of responsibilities can and will be amended by directors if the Board view this as necessary to secure the improvement of an academy or academies within the John Taylor MAT. This is most likely to be the case when an academy is deemed to "Require Improvement" or be judged "Inadequate" by Ofsted. However, there are other circumstances when action may be taken. As the legal entity with responsibility for all its academies, the Board and its directors reserve the right to undertake any remedial action required.

Local Governing Bodies shall discharge these responsibilities primarily, but not exclusively, through both collegiate activity in formal and informal committee and individual engagement (see below):

Committee Structure for each LGB:

Learning and Standards in the Organisation Committee

Managing and Organising the Organisation Committee

Terms of Reference:

Generic Responsibilities for both of the above Committees:

- 1.2.22 The Committee is granted full delegated powers to make decisions within its specific remit (see below) which do not, legally, require MAT Board approval.
- 1.2.23 Where decisions require the approval of the Directors, then the Committee may consider, at the request of the Board, such matters and report back their recommendation(s) for the Directors' attention.
- 1.2.24 A Chair will be appointed at the last meeting of the Committee at the end of each new academic year.
- 1.2.25 A Vice-Chair must be appointed by the committee at the last meeting held at the end of the school year.
- 1.2.26 Each of the two Committees shall consist of all governors of the Local Governing Body.
- 1.2.27 Quorum will be 'half plus one' of the governors – rounding down in the event of an odd number of governors on the LGB.
- 1.2.28 The Committee will meet half termly (six times per year) and otherwise as required, using the terms of reference as a guide to agenda setting.

- 1.2.29 The Committee will review policies and procedures as agreed with the Directors as appropriate for local delegation.
- 1.2.30 The Committee will review progress against areas of the School/Academy Improvement Plan that fall within its remit, and evaluate the impact of activities upon completion.
- 1.2.31 The Committee will review aspects of the Academy's self-evaluation documentation that fall within its remit.
- 1.2.32 Members of staff, recognised trade union representatives, parents, students or external advisors can be invited to the meetings of the Committee if their attendance would assist the Committee in any matter under consideration.
- 1.2.33 Meetings will take place prior (ideally, but not necessarily, within one calendar month) to the meetings of the John Taylor MAT Board.
- 1.2.34 The Clerk will arrange for the distribution of agendas and taking of minutes of the Committee.
- 1.2.35 The Committee may provide governors by invitation to serve upon any bodies established by the Academy or John Taylor MAT Board. This may include for example those set up to deal with appointments, admissions, appeals, human resource matters (e.g. grievance or disciplinary matters) in accordance with paragraph 105A of the Articles of Association.
- 1.2.36 Liaise with the John Taylor MAT Board in the preparation, maintenance and continuous review of the risk register.
- 1.2.37 The Local Governing Body will annually review its own performance and seek continual improvement in the undertaking of its duties.
- 1.2.38 Terms of Reference for the Local Governing Body will be reviewed on an annual basis at the first meeting of the academic year. The terms of reference will be submitted to the John Taylor MAT Board for approval. All amendments to the Local Governing Body terms of reference will require a special resolution by the John Taylor MAT Board i.e. 75% voting in favour.

Managing and Organisation Committee

Mission:

To improve, monitor and evaluate the efficiency and effectiveness of systems, procedures and structures of the Academy and the deployment of resources required to ensure them.

In practice, this will involve improving, monitoring and evaluating:

- all matters relating to budgeting, finance, academy premises and grounds, security and health and safety
- the budget allocated to the academy to achieve value for money
- the proposed annual budget prior to recommendation to MAT Board.
- spending against the academy budget, upon receipt of a report from the Principal
- that the principles of 'best value' are adhered to, as are the Seven Principles of Public Life (selflessness, integrity, objectivity, accountability, openness, honesty and leadership)
- the annual maintenance programme and its implementation
- academy compliance with health and safety standards
- the staffing structure and costings for proposed staffing levels
- safe recruitment procedures for staff appointment
- lettings and charging arrangements within the academy

- the academy's risk management strategy and strategic risk register
- progress towards the achievement of attendance targets
- the impact of the school's punctuality, attendance and behaviour policies
- the quality of the school's provision for personal development and well-being
- the effectiveness of care, guidance and support for learners
- the school's guidance and inclusion systems
- the extent to which students feel safe
- the effectiveness with which the school promotes equal opportunity and tackles discrimination

Individual Engagement:

This can take many and varied forms. Typically, governors will serve on interview panels, support and challenge specific areas of school provision commensurate with the Academy's structure and context (e.g. a subject area or delivery phase) through the role of 'link' governor, attend school events, liaise with their stakeholder constituency (e.g. parents, staff), represent the Academy, and John Taylor MAT positively for the furtherance of its reputation to all with whom they come into contact.

In addition, each Local Governing Body shall have identified governors for the following specific areas:

- Health and Safety
- Special Educational Needs and Disabilities
- Safeguarding
- The Promotion of British Values

Appendix H – LGB Amending Learning Standards Committee Terms of Reference

Roles and Remits of the Local Governing Body within John Taylor MAT

- 1.0 Legal responsibility for the Academy lies with the Company (John Taylor MAT). It is governed by the Directors, who rely on advice and support from the Academy Local Governing Bodies, particularly (but not limited to) strategic planning and the specific matters delegated under these Terms of Reference.
- 1.1 Subject to the provisions of these Terms of Reference, the Companies Act 2006, conditions relating to our charitable status, the Articles and to any further directions given by the Directors, the business of each Academy shall be managed by the Local Governing Body who may exercise all the powers of the Company. The Directors delegate the running of each Academy to the Local Governing Body and specifically the following duties:
 - 1.1.1 articulating the aims and objectives of John Taylor MAT in the local context of the Academy;
 - 1.1.2 determining the execution of the educational vision of John Taylor MAT in consultation with the Directors, including, but without limitation, determination of the Academy improvement plan;
 - 1.1.3 ensuring compliance with the Terms of Reference under which the Academy is governed and subsequent amendments;
 - 1.1.4 accepting receipt of the Academy annual funding;
 - 1.1.5 compliance with the Academy Financial Handbook (or any subsequent set of financial requirements imposed by the Department for Education) including determination and implementation of procurement policies for the Academy;
 - 1.1.6 oversight with regard to the finances the Academy, including, but without limitation, responsibility for compliance with the financial and accounting requirements detailed within the Funding Agreements;
 - 1.1.7 determination of the corporate planning and strategy for the Academy in consultation with the Directors;
 - 1.1.8 the determination, after consultation with the Directors, of the extent of the services provided to the Academy by the Company and how the costs should be allocated;
 - 1.1.9 determining the cash flow policy for the Academy and monitoring income and expenditure for the Academy;
 - 1.1.10 determining financial and reporting targets for the Academy;
 - 1.1.11 consideration of the Academy's required funding and support to the Directors in connection with the agreement with the DfE of the Academy's budget;
 - 1.1.12 monitoring and reviewing expenditure on a regular basis and ensure compliance with the overall financial plan for the Academy;
 - 1.1.13 maintenance of proper accounting records and the preparation of income and expenditure and balance sheets as required;
 - 1.1.14 maintenance of the Academy estate in accordance with the guidelines established by the Company;
 - 1.1.15 maintaining a fixed asset register;
 - 1.1.16 notifying the Company of any changes to fixed assets used by the Academy;
 - 1.1.17 responsibility for the implementation of human resource policies and procedures and terms and conditions of service;

- 1.1.18 the appointment, job description, appraisal and dismissal of all members of staff of the Academy – although in conjunction with the Directors with regard to holders of TLR1s, Grade 8 or above (support staff) or LG pay spine - but the remuneration of every member of staff and their terms of service shall be within the parameters from time to time established by the Directors;
- 1.1.19 implementation of the admissions policy and arrangements for the Academy in accordance with admissions law and DfE codes of practice;
- 1.1.20 implementation of actions required to comply with statutory regulations and the Funding Agreements.
- 1.1.21 each Local Governing Body will elect from its number a Chair and a Vice Chair of the LGB. These are positions to be elected annually and are subject to formal ratification from the Trust Board prior to commencement via the final LGB meeting (meeting 6) of the year preceding their tenure. Chairs and Vice Chairs of LGBs can chair and vice chair one or both of the Academy's Committees (see 1.2.23 and 1.2.24) but are not obligated to.

The above set of responsibilities can and will be amended by directors if the Board view this as necessary to secure the improvement of an academy or academies within the John Taylor MAT. This is most likely to be the case when an academy is deemed to "Require Improvement" or be judged "Inadequate" by Ofsted. However, there are other circumstances when action may be taken. As the legal entity with responsibility for all its academies, the Board and its directors reserve the right to undertake any remedial action required.

Local Governing Bodies shall discharge these responsibilities primarily, but not exclusively, through both collegiate activity in formal and informal committee and individual engagement (see below):

Committee Structure for each LGB:

Learning and Standards in the Organisation Committee

Managing and Resourcing the Organisation Committee

Terms of Reference:

Generic Responsibilities for both of the above Committees:

- 1.1.22 The Committee is granted full delegated powers to make decisions within its specific remit (see below) which do not, legally, require MAT Board approval.
- 1.1.23 Where decisions require the approval of the Directors, then the Committee may consider, at the request of the Board, such matters and report back their recommendation(s) for the Directors' attention.
- 1.1.24 A Chair will be appointed at the 6th meeting of the Committee at the end of each academic year.
- 1.1.25 A Vice-Chair must be appointed by the committee at the last meeting held at the end of the school year.
- 1.1.26 Each of the two Committees shall consist of all governors of the Local Governing Body.
- 1.1.27 Quorum will be 'half plus one' of the governors – rounding down in the event of an odd number of governors on the LGB.

- 1.1.28 The Committee will meet half termly (six times per year) and otherwise as required, using the terms of reference as a guide to agenda setting.
- 1.1.29 The Committee will review policies and procedures as agreed with the Directors as appropriate for local delegation.
- 1.1.30 The Committee will review progress against areas of the School/Academy Improvement Plan that fall within its remit, and evaluate the impact of activities upon completion.
- 1.1.31 The Committee will review aspects of the Academy's self-evaluation documentation that fall within its remit.
- 1.1.32 Members of staff, recognised trade union representatives, parents, students or external advisors can be invited to the meetings of the Committee if their attendance would assist the Committee in any matter under consideration.
- 1.1.33 Meetings will take place prior (ideally, but not necessarily, within one calendar month) to the meetings of the John Taylor MAT Board.
- 1.1.34 The Clerk will arrange for the distribution of agendas and taking of minutes of the Committee.
- 1.1.35 The Committee may provide governors by invitation to serve upon any bodies established by the Academy or John Taylor MAT Board. This may include for example those set up to deal with appointments, admissions, appeals, human resource matters (e.g. grievance or disciplinary matters) in accordance with paragraph 105A of the Articles of Association.
- 1.1.36 Liaise with the John Taylor MAT Board in the preparation, maintenance and continuous review of the risk register.
- 1.1.37 The Local Governing Body will annually review its own performance and seek continual improvement in the undertaking of its duties.
- 1.1.38 Terms of Reference for the Local Governing Body will be reviewed on an annual basis at the first meeting of the academic year. The terms of reference will be submitted to the John Taylor MAT Board for approval. All amendments to the Local Governing Body terms of reference will require a special resolution by the John Taylor MAT Board i.e. 75% voting in favour.

Specific Responsibilities:

Learning and Standards in the Organisation Committee

Mission:

To improve, monitor and evaluate the quality of provision and teaching, and the resulting achievement and attainment standards.

In practice, this will involve improving, monitoring and evaluating:

- rates of progress and standards of achievement by students, including any underachieving groups
- the effectiveness of whole-school raising achievement strategies and to receive reports from lead staff.
- the quality of teaching and the impact of continuing professional development on improving staff performance
- the effective implementation of appraisal procedures

- that the curriculum is balanced, broadly based, maximises achievement, and meets the needs of all students and complies with statutory requirements
- the promotion of Spiritual Moral Social and Cultural education, preparing students for life in modern Britain and inclusive practice relating to race, gender and disability equality
- the scale, scope and effectiveness of parental engagement
- links with the local community including other schools within and beyond the MAT.
- the views of stakeholders, in order that outcomes are effectively used to inform planning
- the effectiveness and impact of curricular and extra-curricular visits
- the extent to which students develop workplace and other skills that will contribute to their future economic well-being
- the quality of the school's assessment provision
- the effectiveness of curriculum areas
- the effectiveness of provision for children with special educational needs
- the identification and celebration of student achievements

Individual Engagement:

This can take many and varied forms. Typically, governors will serve on interview panels, support and challenge specific areas of school provision commensurate with the Academy's structure and context (e.g. a subject area or delivery phase) through the role of 'link' governor, attend school events, liaise with their stakeholder constituency (e.g. parents, staff), represent the Academy, and John Taylor MAT positively for the furtherance of its reputation to all with whom they come into contact.

In addition, each Local Governing Body shall have identified governors for the following specific areas:

- Health and Safety
- Special Educational Needs and Disabilities
- Safeguarding
- The Promotion of British Values

Appendix I – Scheme of Delegation

JTMAT Audit and Compliance Committee should agree a Scheme of Delegation, established as a formal schedule that distinguishes between matters reserved exclusively for the Trustees' approval or decision, and matters delegated to LGB committees and individuals. The Scheme of Delegation should include the financial limits and signatories applicable to such matters as placing orders and contracts, and issuing cheques.

These limits will be applied to JTMAT academies with an Ofsted rating of good or outstanding. Academies rated below that level have a reduced level of delegation in line with Table A at the end of this document. Levels of delegation will be reviewed annually and adjusted in keeping with the Ofsted rating awarded to the academy in question.

This is a key document which forms the basis for all financial controls in the Trust and should be approved/reviewed at the first meeting of the Audit and Compliance Committee each year.

Contents

- 1 Powers and duties reserved for JTMAT Board
- 2 Powers and duties delegated to JTMAT Audit and Compliance Committee
- 3 Powers and duties delegated to the LGB Managing and Organising Committee
- 4 Financial powers and duties delegated to the Chief Executive Officer (CEO)
- 5 Financial powers and duties delegated to the JTMAT Chief Operating Officer (COO)
- 6 Financial powers and duties delegated to Head(s) of School
- 7 Financial powers and duties delegated to Other Staff
- 8 Summary of financial authorisation Levels

1. Powers and Duties Reserved for JTMAT Board

The Members and Trustees have ultimate responsibility for the trust achieving its charitable objectives and must also ensure compliance with company and charity law and with the trust's funding agreement with the Secretary of State.

They shall be responsible for:

- 1.1 Approval of a written scheme of delegation of its financial powers and duties to its Managing and Organising Committees, its Heads of Schools and other staff (delegated to the Audit and Compliance Committee). The scheme must satisfy the Trustees' ultimate responsibility for ensuring that there are adequate operational controls in place for all the financial processes within the Trust. The Scheme of Delegation should be operated in conjunction with the JTMAT Financial Regulations, within the latest statutory framework.
- 1.2 Ensure the election of Chair and appointment of Governors to the Local Governing Body Committees.

Budgets/Budgetary Control

- 1.3 Formally approving the annual Academy budget for each of its schools at least two months prior to the start of each financial year.
- 1.4 Considering budgetary control reports from the LGB Managing and Organising Committees at every meeting, with relevant explanations and documentation where required.
- 1.5 Authorisation of all variations which cumulatively total in excess of £30,000 between budget headings. Details of all variations approved and authorised by the Managing and Organising Committees are to be formally notified to the Trust Board.

Purchasing

- 1.6 Maintenance of a Register of Business Interests for all Governors, Trustees and Academy staff with financial responsibilities.
- 1.7 The JTMAT Board is responsible for authorising the advertising of tenders above £100,000, and authorising the award of such tenders.
- 1.8 Tenders other than the most financially favourable, or late tenders, can only be accepted by the Trust Board who shall minute the reasons for their decision.

Income

- 1.9 Authorisation of the write off of debts not collectable (the Secretary of State's prior approval is also required if debts to be written off are above the value set out in the annual funding letter).

Security of Assets

- 1.10 Authorisation of the disposal of individual items of equipment and materials that have become surplus to requirements, unusable or obsolete with an original purchase value between £5,001 and £20,000.

2. Powers and Duties Delegated to JTMAT Audit and Compliance Committee

Accounts and Audit

- 2.1 To recommend a Scheme of Delegation for adoption by the Trust Board, established as a formal schedule that distinguishes between matters reserved exclusively for the Directors and Members approval or decision, and matters delegated to LGB committees and individuals.
- 2.2 To make recommendation to the Trust Board regarding the appointment of internal and external auditors.
- 2.3 To review the external auditors annual planning document and approve the planned audit approach.
- 2.4 To review the draft financial statements and audit report and recommending approval of the audited financial statements to the Trust Board prior to submission to the ESFA by 31 December.
- 2.5 To agree an annual programme of internal audit checks.
- 2.6 To receive internal audit reports on the use of resources, systems of internal financial control, and discharge of financial responsibilities and report such to the Trust Board.

- 2.7 To ensure compliance and effectiveness of the risk management process and recommending changes/amendments of those processes to the Trust Board.
- 2.8 Receive, note and disseminate across the JTMAT, new guidelines on best practice in financial and governance matters.
- 2.9 Annual review of JTMAT levels of financial autonomy delegated to each of its academies. Only the Trust Board can make this decision.
- 2.10 Review of the Financial Procedures Administration and Control handbook, its appendices and related policies.
- 2.11 To review all JTMAT policies and appendices as they fall due and make recommendations to the MAT board for the adoption of any necessary amendments/additions.
- 2.12 Review of appropriate level of JTMAT uncommitted reserves.
- 2.13 Informing the Trust Board if it suspects any irregularity affecting resources.
- 2.14 To review an annual report on school Gifts and Hospitality registers.

3. Powers and Duties Delegated to the LGB Managing and Organising Committee

The Managing and Organising Committees shall be responsible for:

General

- 3.1 Exercising the powers and duties of the Trust Board in respect of the financial administration of each Academy, except for those items specifically reserved for the Trust Board and those delegated to the CEO and other staff.
- 3.2 Reporting on decisions taken under delegated powers to the next meeting of the Committee.

Budgets/Budgetary Control

- 3.3 Reviewing the annual Academy budget prior to the start of each financial year and recommending its acceptance, or otherwise to the Trust Board.
- 3.4 Considering budgetary control reports on the Academy's financial position at every meeting, taking appropriate action to contain expenditure within the budget and report to the Trust Board.
- 3.5 Reviewing the variations of sums between budget heads, subject to a limit of £30,000, as approved and authorised by the Head of School, which are to be formally notified to the Managing and Organising Committee who shall minute the notification.
- 3.6 Reporting to the Trust Board all significant financial matters and any actual or potential overspending with appropriate explanations.

Purchasing

- 3.7 Authorising the award of orders and contracts between £30,001 and £100,000.

Insurances

- 3.8 Ensuring that arrangements for insurance cover are in place and adequate.

Security of Assets

- 3.9 Ensuring that there are annual independent checks of assets and the asset register.
- 3.10 Authorising the disposal of individual items of equipment and materials that have become surplus to requirements, unusable or obsolete with an original purchase value of up to £5,000.

4. Powers and Duties Delegated to the Chief Executive Officer (CEO) as Accounting Officer for the Trust

- 4.1 To make recommendations to the JTMAT Board regarding changes to Governance arrangements, JTMAT Terms of Reference and Articles or Funding agreements.

Budgets/Budgetary Control

- 4.2 Approving variation requests between budget headings of over £30,000 and reporting such approval to the MAT Board.

Purchasing

- 4.3 Authorising orders and contracts between £30,001 and up to £100,000 including authorising suitably justified requests to waiver Trust procurement procedures and reporting to the JTMAT Board.

Payroll and Personnel

- 4.4 Authorising permanent changes to the establishments of all JTMAT Academies.
- 4.5 Approving staff appointments/terminations and variations for all JTMAT schools within the authorised establishment.
- 4.6 Certifying the payment of salaries each month, in conjunction with the JTMAT Chief Operating Officer.

5. Powers and Duties Delegated to the Chief Operating Officer (COO)

Budgets/Budgetary Control

- 5.1 To make recommendations to JTMAT Audit and Compliance Committee regarding changes to the Scheme of Delegation.
- 5.2 Recommendation of an annual JTMAT budget to the JTMAT Board in respect of JTMAT management fee income.
- 5.3 Presentation of JTMAT budgetary control reports to each meeting of the MAT Board.
- 5.4 Approving variations between budget headings of up to £30,000 and reporting such approval to the MAT Board.
- 5.5 Ensuring all JTMAT contracts and agreements conform to current Financial Regulations.

Purchasing

- 5.6 Authorising orders and contracts between £10,001 and up to £30,000 and reporting to the MAT Board.

Payroll and Personnel

- 5.7 Authorising staff appointments/terminations and variations for all JTMAT schools via the MyView HR online portal following approval by CEO.
- 5.8 Certifying the payment of salaries each month, in conjunction with the JTMAT Chief Executive Officer.

Accounts and Audit

- 5.9 The operation of financial processes within each Academy, ensuring that adequate operational controls are in place and that the principles of internal control are maintained.
- 5.10 Ensuring that full, accurate and up to date records are maintained in order to provide financial and statistical information.

6. Financial Powers and Duties Delegated to the Head(s) of School

The Head of School(s) have delegated powers and functions in respect of internal organisation, management and control of the Academy, the implementation of all policies approved by the Trust Board and for the direction of teaching and the curriculum.

The Head(s) School shall be responsible for:

Budgetary control

- 6.1 Reviewing income and expenditure reports and highlighting actual or potential overspending to the LGB Managing and Organising Committee.
- 6.2 Approving variations between budget headings between £10,001 and £30,000 and reporting such approval to the COO and Managing and Organising Committee.

Financial Management

- 6.3 Ensuring the arrangements for collection of income, ordering of goods and services, payments and security of assets are in accordance with JTMAT Financial Regulations.

Purchasing

- 6.4 Authorising orders and contracts between £5,001 and £30,000 (Primary) and £10,001 and £30,000 (Secondary).
- 6.5 Ensuring that all contracts and agreements conform to the Financial Regulations.

NB: Heads of School can sign formal contracts and agreements for values above their personal authorisation level providing that those contracts have been awarded using the Trusts normal procurement processes.

Payroll and Personnel

- 6.6 Requesting CEO permission to recruit via the JTMAT Intention to Recruit form.
Recommending staff appointments/terminations and variations to JTMAT and ensuring these are actioned on the MyView administration system.

Security of Assets

- 6.7 Ensuring that proper security is maintained at all times for all buildings, furniture, equipment, vehicles, stocks, stores, cash, information and records etc under his/her control.

Accounts and Audit

- 6.8 The operation of financial processes within the Academy, ensuring that adequate operational controls are in place and that the principles of internal control are maintained.

- 6.9 Ensuring that full, accurate and up to date records are maintained in order to provide financial and statistical information.
- 6.10 Ensuring that all records and documents are available for audit by the appointed internal and external auditors.

7. Financial Powers and Duties Delegated to Secondary school Business Managers NB: In primary schools these responsibilities may be undertaken by an Office or Finance manager in conjunction with the Head of School

The Business Manager shall be responsible for:

Budgets/Budgetary Control

- 7.1 Preparing an annual draft budget plan for consideration by the LGB Managing and Organising Committee and Trust Board before the start of the relevant financial year.
- 7.2 Monthly monitoring of expenditure and income against the approved budget and submitting reports on the Academy's financial position to every meeting of the Managing and Organising Committee. Any actual or potential overspending shall be reported to the Committee with appropriate explanations.
- 7.3 Approving variations between budget headings up to a value of £10,000 and reporting such approval to the Managing and Organising Committee.

Purchasing

- 7.4 Authorising orders and contracts between £10,001 and £30,000 in conjunction with Budget Holders.
- 7.5 Maintaining a register of formal contracts entered into, amounts paid and certificates of completion.
- 7.6 Retention of quotes obtained for goods, works and services.
- 7.7 Ensuring that all correct invoices are duly certified by authorised staff before payments are made and that invoices, vouchers and other records are retained and stored in a secure way and are readily available for inspection by authorised persons.
- 7.8 Authorisation can be actioned via email provided that the budget holder's work email address is used.
- 7.9 Ensuring the appropriate division of duties between staff responsible for processing orders, receiving deliveries and processing payments.

Payroll and Personnel

- 7.10 Notifying the payroll provider of any matters affecting payments to employees.
- 7.11 Ensuring that the monthly payroll is checked, and certifying it for payment in conjunction with the Head of School or other senior member of staff and confirming such to JTMAT COO.

Income

- 7.12 Ensuring that all income is accurately accounted for and is promptly collected and banked intact.

Banking Arrangements

- 7.13 Maintaining proper records of account and reviewing monthly bank reconciliations.

Insurances

- 7.14 Notifying the Managing and Organising Committee on any eventuality that could affect the Academy's insurance arrangements.

Security of Assets

- 7.15 Maintaining a permanent and continuous register of all items of furniture, equipment, vehicles and plant.

Information and Communication Systems

- 7.16 Maintaining the standards of control for such systems in operation within the Academy to include the use of properly licensed software, and for the security and privacy of data in accordance with the General Data Protection Regulations (2018).

8. Financial Powers and Duties Delegated to other staff

Members of staff with delegated responsibilities should be aware that these must be exercised in accordance with Financial Regulations.

The following responsibilities are delegated to other staff in addition to the Head(s) of School, Business Manager and Finance staff:

Budgets/Budgetary Control

- 8.1 Subject Area Leaders appointed as Budget Holders are responsible for checking budget reports against their delegated budget and for reporting any errors or irregularities to the Finance/Business Manager. Any actual or potential overspending shall also be reported to the Finance/Business Manager.

Purchasing

- 8.2 Budget Holders can authorise orders up to £5,000 provided it is within the scope and remaining balance of their delegated budget.
- 8.3 The following members of staff, in addition to the Head of School and Finance/Business Manager are authorised to open tenders in the presence of another authorised person:
- Deputy Head(s) of School
 - Assistant Head(s) of School
- 8.4 The following members of staff are authorised to receive and check goods:
- Budget Holders
 - Administrators nominated by the Budget Holder

9. Summary of Financial Authorisation Levels

Delegated Duty	Value		Delegated Authority	Method
Ordering Goods and Services (raising requisitions)	Up to £5,000		Budget Holder/Finance Officer (Primary school and JTMAT Finance Manager)	Selection from preferred supplier list unless agreed otherwise with Finance Office
	£5,001 to £10,000		Finance Officer(Secondary sch) /Primary Head of School and JTMAT COO	Two quotes required
	£10,001 to £30,000		Primary and Secondary Head of School/Secondary school Business Manager or JTMAT COO	Three quotes required
	£30,001 to £100,000		JTMAT CEO plus report to LGB Managing and Organising Committee	Formal tendering process, including advertising in OJEU (if over the OJEU threshold)
	Over £100,000		As above plus report to JTMAT Board	
	Authority to accept other than lowest quotation or tender		JTMAT Board	
	Authority to approve a formal request to waiver Trust normal procurement procedures		JTMAT CEO and reporting to JTMAT Board	All requests above £5,000
Signatories for cheques, BACS payment authorisations and other bank transfers	Any		Two signatures from a minimum of three in accordance with the bank mandate for the Trust	
Signatories for EFA grant claims and EFA returns	Any		Two signatories (or as required by EFA) from: - JTMAT COO - JTMAT CEO - Nominated Trustee	
Variation of budget provision between budget headings	Up to £10,000		Head of School (Primary School)/JTMAT COO/ Secondary School Business Manager/Primary Finance Officer, reporting to the Managing and Organising Committee	
	£10,001 to £30,000		Heads of School (Primary and Secondary) reporting to the Managing and Organising Committee	

	Over £30,000		CEO - reporting to the JTMAT Board	
Disposal of assets	Up to £5,000		Managing and Organising Committee	
	£5,001 to £20,000		M&O plus JTMAT Board	
	Over £20,000		M&O, JTMAT Board plus ESFA approval required for disposal of assets funded with more than £20,000 of ESFA grant, or transferred from an LA at nominal consideration	
Write-off of bad debts	Up to £1,000		Managing and Organising	
	£1,001 - £44,999		M&O plus Trust Board	
	Over £45,000		M&O, Trust Board plus ESFA approval	
Purchase or sale of any freehold property	Any		ESFA approval required	
Granting or take up of any leasehold or tenancy agreement exceeding three years	Any		ESFA approval required	
Raising invoices to collect income	Up to £5,000		Business Manager/ Senior Finance Officer(Secondary School) Finance Officer (Primary School and JTMAT Finance staff)	
	£5,001 to £10,000		Head of School or JTMAT COO	
	£10,001 to £100,000		Managing and Organising Committee/JTMAT Board	
	Over £100,000		JTMAT Board	

TABLE A - Academy levels of Financial Autonomy

JTMAT Board reserves the right to reduce autonomy levels upon notification of the resignation of a senior member of staff with financial responsibility or upon suspicion of fraudulent activity.

Level of Financial Autonomy	Control Over	Identification	Notification of move reducing autonomy to next level down
4 - Complete	All aspects of financial and budgetary management, staff employment, resource procurement, capital programmes, capitation, et al under the full control of the Head of School/LGB	Through regular financial and budgetary monitoring and evaluation undertaken by JTMAT COO	Verbal highlighting of issues by JTMAT Chief Operating Officer to Head of School/ LGB to enable remedial actions before next LGB meetings
3 – Largely	Largely full autonomy with most aspects of financial and budgetary management, resource procurement, capitation, et al under the full control of the Head and LGB but with wider controls/some restrictions on some high level staff employment, capital programmes and larger expenditures or virements of the budget	Through regular financial and budgetary monitoring and other internal evaluation undertaken by COO	Written reports of JTMAT COO detailing recommendations to remedy any issues identified. Followed by a recorded letter of extent of reduction in autonomy from CEO to LGB
2 – Reduced	Reduced autonomy in many areas of financial and budgetary management as well as most large financial expenditures including most high level staff employment, larger resource procurement, capital programmes and any larger expenditures or virements of the budget	Through regular financial and budgetary monitoring and evaluation by COO /CEO plus Chair of Audit and Compliance Committee to identify remedial actions	Letter from CEO to LGB outlining issues and detailed recommendations of CEO and the Chair of the Audit and Compliance Committee to remedy issues identified in order to regain greater autonomy
1 – Minimal	Significant reductions in all areas of financial and budgetary management as well as most large financial expenditures including all staff employment, larger resource procurement, capital programmes and all larger expenditures or virements of the budget	Following extensive monitoring and evaluation by COO/ CEO and Chair of Audit and Compliance Committee to make recommendations for necessary reductions in autonomy	Letter from Chair of Trust Board to LGB outlining issues and detailing recommendations of CEO/ COO and Audit and Compliance Committee that must be immediately implemented in order to address serious weaknesses identified
0 - None	Zero autonomy with all aspects of financial management, staff employment, resource procurement, capital programmes, capitation, etc under the full control of the CEO/COO and MAT Board	Following extensive monitoring and evaluation by COO/ CEO and Audit and Compliance Committee all financial autonomy is removed to prevent further financial risk/ damage to the Trust	

Appendix J – Management Fee

Our Management fee will typically range from 3-6% of the Total School Allocation plus the 16-19 Allocation (secondary schools). The % charged is subject to annual review by the Trust Board and is initially based on the Ofsted rating of the school in question and is currently:

- Outstanding – 3%
- Good – 4%
- Requires Improvement – 5%
- Inadequate 6%

The management fees from all schools contribute to the following range of services:

School Improvement

- Access to our team of School Improvement Partners (Primary & Secondary), Specialist Leaders in Education (SLEs), other outstanding teachers and leaders;
- Access to the DSL and SENCO collaborative groups;
- Annual Pupil Premium review or health check on request;
- Widespread staff secondment and shadowing opportunities;
- Access to a range of training courses offered by the John Taylor Teaching School HUB and the Staffordshire Research School;
- Membership of the Confederation of School Trusts (CST)
- Trust Board and Governors' leadership and training opportunities – plus attendance at JTMAT annual Governors' conference;
- Membership of JTMAT Clerking group for LGB Clerks;
- Access to the Governance Portal;
- Access to the Teaching and Learning Repository;
- Governance support via the School Representation Group;
- Professional learning networks for subject/phase leaders and teachers;
- Annual validation of self-evaluation through our school improvement strategy;
- Leadership Peer Review – Senior teams engaging in professional dialogue, ideation collaboration and challenge;
- Access to the Attendance Intervention Manager service (additional charges may apply);
- Regular Trust-wide training days;
- Support with OFSTED inspections.

Business Management

- Support through the Due Diligence and Academy conversion process;
- HR Advice/support package via PHRP including JTMAT specific training and attendance at appropriate briefings;
- Data Protection Officer service;
- Guidance with processing of all contractual appointments/terminations and variations;
- Payroll provision for all schools;
- Membership of JTMAT Business/Finance Manager group for senior Business/Finance staff;
- Provision of internal and external audit services;

- Access to financial expertise and training from a range of Trust staff including the Trust Company Accountant and Chief Operating Officer;
- Processing of all ESFA returns, VAT returns, BACS payments and month and year end procedures;
- Health & Safety SLA with SCC paid by the Trust;
- Access to the School Condition Allocation in line with the Trust strategy for disbursement of funds;
- Estates management support (including advice with Health & Safety Audits and other statutory premises requirements);
- Legal advice for day to day issues (additional school contribution may be required depending on circumstances);
- Information Commissioner Registration (Data Protection licence);
- Access to procurement savings via Trust group agreements.

IT services and packages

- IT advice/support and guidance as required from JTMAT Strategic ICT Network Manager;
- Set up of new locations on the PS Financials finance package;
- Broadband connectivity;
- Provision and installation of School IP package for planning, self-evaluation and performance management;
- Provision and installation of Salamander package;
- Provision of the MyConcern package for safeguarding;
- Initial provision of Go4Schools (secondary schools) and Classroom Monitor (primary schools).

JTMAT reserve fund

- Where possible, the Trust will commit funds towards its long term capital and infrastructure development.

Appendix K – Review of Value for Money

JTMAT Review of value for money

As Accounting Officer, the CEO has responsibility for ensuring that the academy delivers good value in the use of public resources. The Accounting Officer understands that value for money refers to the educational and wider societal outcomes achieved in return for the taxpayer resources received.

The Accounting Officer considers how the academy trust's use of its resources has provided good value for money during each academic year, and reports to the MAT Board where value for money can be improved, including the use of benchmarking data where appropriate. The Accounting Officer for the academy has delivered improved value for money during the year by:

1. Robust governance and oversight of the Academy Trust's finance

The Accounting Officer has responsibility for reviewing the effectiveness of the systems of internal control. He is informed by the internal audit service – commissioned by the Audit and Compliance Committee – who undertake reviews of key financial policies, procedures, and their implementation. Reports are produced which detail the Trust's compliance and demonstrate that the Trust has robust systems and financial controls in place. These reports are presented to the Audit and Compliance Committee in order to elicit a management response, agree any appropriate action to be taken and any further distribution of the report and its implications (e.g. to the Managing and Organising Committees of Local Governing Bodies or the MAT Board). The MAT Board approves the budget each year and is mindful of the need to balance expenditure against income to ensure the Trust remains a "going concern". The MAT Board also receives and approves the Statutory Accounts and the External Auditor's Management Report.

2. Reviewing controls and managing risks

The budget is monitored on a regular basis by the Chief Operating Officer (COO) and the CEO through the production of reports that are generated direct from each academy's financial management systems. Remedial action is taken to address any significant variances that may have an impact on the budget outturn. The COO reports half termly to the MAT Board, presenting a budget monitoring report which details the consolidated financial position of the Academies to date and gives an update on the budget for the year, including any significant variances. In turn these are reported, at summary level, to the LGB Managing and Organising Committees of each academy indicating their own academy's financial position.

A risk register is reviewed at every meeting by the Trust, and financial risk is reviewed further by the Audit and Compliance Committee. The risk register details aspects of procedure and practice that contains risk, the extent of the impact should the risk manifest itself, the likelihood of the Trust's exposure to such an incidence, the control mechanisms in place to mitigate likelihood and impact, and the confidence with which we regard those controls as being effective. Annually, the Audit and Compliance Committee asks the CEO and COO the following:

- a) Have any risks recorded on the register materialised?
- b) Are there any new risks that have been added since the previous review?
- c) Are there any risks that have been removed as no longer applicable since the previous review?

d) Have there been any adjustments to the control procedures detailed in the register since the previous review?

In addition, “Risk” is a standing item on all Trust and LGB committee agendas, providing a regular opportunity for senior leaders, directors and governors to discuss risk and its management outside of an annual review. The Trustees have produced a Reserves Policy which provides clarity on the extent and use of reserves generated by the Trust. This ensures sufficient working capital is provided to cover any cash flow issues that may arise between expenditure and receipt of grants, and provides a contingency to assist in the management of any unexpected and urgent costs e.g. emergency maintenance work on site, and provides the resources for future significant capital projects.

3. Maximising income generation

The Trust deposits surplus cash balances in accounts which offer the best interest rates available for secure investment to maximise interest earning potential. The Trust explores every opportunity to generate income through fund raising and grant applications. The growth of the school – through ‘converter’ academies and new free school provision – has added to the Trust’s infrastructure. As the hub school for a Teaching School Alliance (The National Forest Teaching School) and now as the host of both a Research School (The Staffordshire Research School) and, from September 2021, a Teaching School Hub (the John Taylor Teaching School Hub) we encourage applications for grants and funding streams that provide opportunities to engage in research and development, initial teacher training, school to school support and other strategies that directly relate to the Trust’s core purpose and mission. The accommodation of nursery provision at several of our primary schools also generates income for the Trust. Income generated from lettings has also risen, and the Trust continues to seek ways in which it can enhance its use as a community resource and generate additional income towards its core activities in the process. Finally, the CEO’s engagement as an NLE, as a member of the RSC’s Headteacher Board, and the West Midlands Lead for the Teaching School Council are all additional sources of income, where the resources are re-routed into our provision. This work is also exceptionally valuable in the enhancement of the influence and reputation of the Trust beyond its locality.

4. Ensuring value for money is achieved and resources are used efficiently and effectively

The CEO and COO prepare the budget for directors’ approval from the priorities established in the Strategic Plan produced with reference to the Trust’s three-year Strategic Plan, available at www.jtmat.co.uk. Through the improvement planning and self-evaluation processes, the Trust evaluates the effectiveness of strategies introduced in previous years in order to secure greater effectiveness and efficiency of resource deployment in subsequent plans. This is also assisted by the use of a self-evaluation tool at Trust level.

The staffing structures of the Trust’s academies are reviewed annually by the Local Governing Bodies of each Academy and staffing is deployed to drive and support curriculum delivery, intervention initiatives, and wider school improvement. Targeted and restricted funding (e.g. Pupil Premium) is deployed in accordance with criteria associated with it.

Contracts and services are regularly appraised and renegotiated when appropriate to ensure value for money. The Trust and its Academies seek multiple quotations for goods and services where possible. In exceptional circumstances when it is not possible to secure several alternative costings, the reason is recorded in the Procurement Waiver documentation. The Trust utilises benchmarking information where available.

The Trust works closely with other local schools and academies to ensure best value. Through the Teaching School Alliance and other partnerships, economies of scale can be gained when procuring teacher training courses and other resources relating to our core activities. The Trust always assesses the costs and benefits of various options before making a purchasing decision in order to ensure that such a decision is securing best value and is the right option for the Academy for the longer term.

The purpose of the system of internal control

The system of internal control is designed to manage risk to a reasonable level rather than to eliminate all risk of failure to achieve policies, aims and objectives; it can therefore only provide reasonable and not absolute assurance of effectiveness. The system of internal control is based on an ongoing process designed to identify and prioritise the risks to the achievement of academy policies, aims and objectives, to evaluate the likelihood of those risks being realised and the impact should they be realised, and to manage them efficiently, effectively and economically. The system of internal control has been in place in John Taylor MAT for the year 1 September 2020 to 31 August 2021 and up to the date of approval of the annual report and financial statements.

Capacity to handle risk

The Directors have reviewed the key risks to which the Trust is exposed together with the operating, financial and compliance controls that have been implemented to mitigate those risks. A log of discussions and amendments to the Risk Register is detailed at the foot of the document, providing a chronicle of changes over time. The MAT Board is of the view that there is a formal on-going process for identifying, evaluating and managing the Trust's significant risks that has been in place for the year ended 31 August 2021 and up to the date of approval of the annual report and financial statements. This process is regularly reviewed by the MAT Board.

The risk and control framework

The Academy Trust's system of internal financial control is based on a framework of regular management information and administrative procedures including the segregation of duties and a system of delegation and accountability. In particular, it includes:

- comprehensive budgeting and monitoring systems with an annual budget and periodic financial reports which are reviewed and agreed by the Board of Trustees;
- regular reviews by the Trust Board of reports which indicate financial performance against the forecasts and of major purchase plans, capital works and expenditure programmes;
- setting targets to measure financial and other performance;
- clearly defined purchasing (asset purchase or capital investment) guidelines;
- identification and management of risks;
- exceptional risk assessments for Covid-19 related risks.

All of the above is augmented by the Trust's Whistleblowing Policy which is available to all stakeholders. The Audit and Compliance Committee has considered the need for a specific internal audit function and currently utilises the services of RSM UK Group LLP auditors as internal auditor which reports biannually. The key areas of focus for the audit committee has been around operational and regularity issues with a particular focus on the risk of fraud.

Appendix L – Self Evaluation

This self-evaluation document is designed to help us to understand better our position against standards expected by others (e.g. the Regional Schools Commissioner's Office); to support JTMAT to become a stronger, more improvement-focused, sustainable organisation; and for the Trust to evaluate its own growth plans. We recognise that maturity is not just about doing more of the same, better.

This self-evaluation considers the overall performance of the Trust and five key areas of effective practice in JTMAT:

- Governance
- Supporting School Improvement
- People and Leadership
- Financial Sustainability
- Risk Management

The self-evaluation categorises the development of the Trust in each area against four possible stages of maturity as identified by the Department for Education:

Beginning – this early stage is an indicator that the Trust is new and that whilst the characteristic has been identified as being important, the progress within the characteristic is embryonic and developmental. Trust activity is focused on oversight and structures as the culture and ethos is established in the schools

Developing – this moves beyond the embryonic and it is clear that the Trust has started to drive improvement and strategy to embed stronger and better practice in the schools to sustain their improvement over time. Key improvements are being shared across the Trust

Embedding – this moves to a more concise model of Trust influence where some of the systems and structures that the Trust wants to embed are now in place and making a difference. Staff work together through Trust co-ordinated work and independent collaborative groups that staff set up themselves.

Leading – The MAT is leading and will be influencing practice beyond its own organisation. Momentum towards collaboration is now significantly beyond the act of working together to the common understanding and ability to articulate exactly how collaboration works and enables change to be sustained.

Note: This document is a working document designed to support the development and growth of JTMAT.

It is not intended to supersede or replace the specific requirements for financial management, reporting and control outlined in the Academies Financial Handbook, nor the Trust's current Strategic Plan.

Overall Performance	Beginning	Developing	Embedding	Leading
There is clear evidence that the outcomes for young people who are educated within the MAT are exceeding previous performance and national expectations.				

Area for Development (Overall Performance):

Governance	Beginning	Developing	Embedding	Leading
1 There is a well communicated strategic vision & plan that moves seamlessly from implementation into impact. The school improvement plan can only be delivered through support from the Trust and the Trust priorities can only be delivered through the academies.				
2 There are clear quality assurance systems in place to improve consistency and performance				

Governance	Beginning	Developing	Embedding	Leading
3 There is a clear delegated framework for governance at Trust Board and local governing body level that makes the responsibilities of both the Board and any LGBs explicit				

Areas for Development (Governance):

Supporting School Improvement	Beginning	Developing	Embedding	Leading
4 There is a Trust-wide school improvement strategy that recognises the different interventions needed at different stages of the improvement journey that a school undertakes.				
5 There is a systematic programme of school to school support that is focused on the need of individual academies.				

Supporting School Improvement	Beginning	Developing	Embedding	Leading
6 There is a Trust wide commitment to making a contribution to local, regional and national educational networks beyond the MAT.				

Areas for Development (Supporting School Improvement):

People & Leadership	Beginning	Developing	Embedding	Leading
7 There is a clear accountability framework for the performance of the Trust that all staff understand, including what happens when key staff under-perform				
8 There is a clear succession plan for the key posts within the MAT (CEO, Director of Finance, HR, Chair of Board, members and directors, Principals and Vice Principals)				

Areas for Development (People and Leadership):

Financial Sustainability	Beginning	Developing	Embedding	Leading
9 The Trust has strong and sustainable finances which enable it to deliver the education it wants for its young people.				
Risk Management	Beginning	Developing	Embedding	Leading
10 There is evidence of skilled management of Trust risk indicators				

Areas for Development (Financial Sustainability and Risk Management):

Appendix M - School Improvement Strategy

We believe in the power of education to improve lives – and the world. John Taylor Multi-Academy Trust appreciates that, at times, schools require additional intervention beyond their own resources in order to either accelerate its existing improvement trajectory or develop momentum that will subsequently be sustained by the school itself. The Trust also accepts its responsibilities and accountabilities in ensuring that all children entrusted to our care receive provision and achieve outcomes that compare favourably to those of children outside the MAT. In this context, our strategic objectives are as follows:

- Children are well-prepared for the next stage in their lives through experiencing the best learning opportunities through exceptional teaching and support, and access to high quality resources and provision in and beyond the classroom.
- Children achieve more, and make better progress, by attending a JT MAT academy than would otherwise be expected. We add value.
- Our academies are full, and always oversubscribed as a result of their popularity, reputation and success.
- Our academies are staffed with high-performing professionals, exhibiting passion and taking pride in their work, in a context of effective support and challenge.
- Accommodation and premises are safe, well-maintained, and with facilities that are constantly improving.
- Infrastructure is both effective and efficient, underpinned by sound financial management practices whereby value for money is always given due regard.
- Management systems are coherent and cohesive, and staffed by colleagues who are innovative adaptable, and capable of absorbing new initiatives.
- Our academies, and the Multi-Academy Trust, are held in the highest regard by others within and beyond the education sector, and our work and its impact is validated by external accreditation and inspection.

The Trust's school improvement strategy can, and should, impact on all areas as set out in our objectives.

Collaboration is a strong feature of our school improvement strategy. We acknowledge that collaboration is organic - something that grows over time as relationships develop. This is a model of school improvement which we aspire to and which will itself evolve as the MAT matures and develops.

It is based on ensuring that we know our schools well, can be responsive to need and share a common understanding of what exceptional teaching and learning looks like.

The strategy acknowledges the importance of strong and empowering leadership at all levels, the targeting of resources effectively, and the need to monitor, evaluate and review regularly in order to both measure improvement and ensure that it is anchored firmly in the school and its staff. The Trust is aware that embedding change requires cultural shift in addition to structural adjustments. Here, the commitment and enthusiasm of all stakeholders in the school will be pivotal.

Key Drivers

Making sure we **know our schools** – the strengths it can bring to collaboration and areas in which it will need collaborative support.

Maintaining a **focus on teaching and learning** – through engendering growth mindsets in all teachers and learners, and providing opportunities to support that growth.

Developing and empowering our leaders – to drive forward plans, people and progress.

Having **consistency of core systems** across schools – establishing coherent and clear foundations upon which to build innovation and consequent success.

Central School Improvement Team

Our central School improvement Team is supported in 2021 – 2022 by secondee appointments to the following roles

Primary English lead

Primary Maths lead

EYFS lead

Early Career Framework lead

John Taylor TS hub

John Taylor High School was designated a Teaching School hub in 2021. The Hub has an important role to play in the training and development of teachers and leaders throughout their career, providing a golden thread of evidence-based programmes and qualifications which will effectively support both the effective recruitment and retention of high quality teachers and leaders in our Trust. People development is one of the key priorities within our 3 year strategic plan and the TS hub will be instrumental in ensuring that we can deliver successfully on this.

Through the TS hub our schools will benefit by providing:

- Direct access to trainee teachers
- Local ECT training and support for Early Career Teachers from our ECT secondee
- Access to a full suite of specialist and leadership NPQs delivered locally
- The Appropriate Body Services offered by the TS hub

JTMAT Professional Development Offer

JTMAT will seek to establish training and development needs across the Trust and in collaboration with the TS hub, to ensure that the “other CPD” designed by the TS hub includes programmes to meet those needs. The Trust will subsidise* a range of courses and programmes included in this offer as follows:

- Primary NQT+1 programme
- Secondary NQT+1 programme
- Effective middle leadership
- Aspiring to senior leadership
- The Aspirant Headteacher programme

- All programmes offered through the Research School

**1st place will be free*

2nd place will receive a 50% discount

3rd and subsequent places a 25% discount

In addition, as identified in the strategic plan, JTMAT wishes to support and promote the development of a coaching culture in all our schools. A coaching programme will be offered through the TS hub and this will be discounted by 50% per participant for JTMAT schools.

Staffordshire Research School

JTMAT is also home to the Staffordshire Research School and alongside the TS hub will be instrumental in supporting us to deliver on various aspects of the strategic plan. In addition to access to subsidised EEF programmes delivered locally, there will be opportunity for identified Evidence Leads from each school in the Trust to form a network, led by the Operational Research Lead, to support collaboration and dissemination of best practice within all our schools.

Network meetings

Other JTMAT network groups will continue with some of them meeting for extended blocks of time to undertake specific work on the Curriculum, Teaching and Learning and Assessment. By strategically planning opportunities for collaboration, we aim to strengthen cross school working, the sharing of resources and best practice and have a positive impact on staff workload and wellbeing.

Reviews

All schools will have access to free Pupil Premium checks and SEND reviews according to identified need.

We do however recognise that there are times when we must look beyond our own resources to secure the high-quality inputs needed by our schools individually or the Trust collectively. Here, John Taylor Multi-Academy Trust will look to source such inputs from other Multi-Academy Trusts and Teaching School hubs. This is because:

- a. Other MATs and Teaching Schools Hubs will have a clear understanding of our needs due to the similarity of their own context
- b. As social enterprises, any income they derive will be put back into the sector – and ultimately benefit children and their education
- c. Forging relationships with other Trusts and Teaching Schools Hubs builds our capacity, and provides opportunity for reciprocal arrangements
- d. John Taylor MAT and the John Taylor Teaching School Hub are already connected to regional networks that enable such discussions to take place readily.

Only in the event that we cannot secure external support of appropriate quality through a MAT or Teaching School Hub will we look to commercial suppliers and contractors.

School Improvement Framework:

John Taylor MAT is mindful of the Department for Education's 'phased' approach to schools on their improvement journeys, and would look to ensure any schools that join us in phases 1 or 2 move briskly towards self-improvement, proactivity, innovation and anchored improvement:



John Taylor Multi-Academy Trust would look to secure improvement in all MAT schools in the following key areas (KAs):

KA1 – Pupil outcomes (focus on progress)

KA2 – Leadership and Management at all levels, Self Evaluation, Compliance and Governance

KA3 - Curriculum and Broader Educational Offer.

KA4 – The Quality of Teaching, Learning and Assessment

KA5 – Behaviour and Climate for Learning

For a school in 'phase 1' in the table above, basic compliance (e.g. single central record, safeguarding arrangements, governance operations) is a pre-requisite for moving forward, hence its positioning at the forefront of our approach. The curriculum and educational offer will also be subject to very early review, in that the dividend to outcomes that an appropriate curriculum offer can return is considerable, but the longer the implementation time – the longer the delay in any positive impact that can be derived. The quality of teaching, systems and cultures of behaviour, and an appraisal of leadership capacity throughout the school are of crucial importance, and would be audited for effectiveness as soon as practicable.

Auditing effectiveness and initiating change:

For each of the above areas, a framework of effectiveness has been produced (see Appendix C), and each school will be evaluated against this framework – as either 'critical' (the lowest categorization), 'concerning', 'embedding', 'secure' or 'leading' (the highest categorization). An overall appraisal of

the school's position will also be made that is informed by, but not exclusively calculated using, the evaluations for each key area.

Outcomes will also be evaluated, against MAT and national comparators, and this will also inform categorisation.

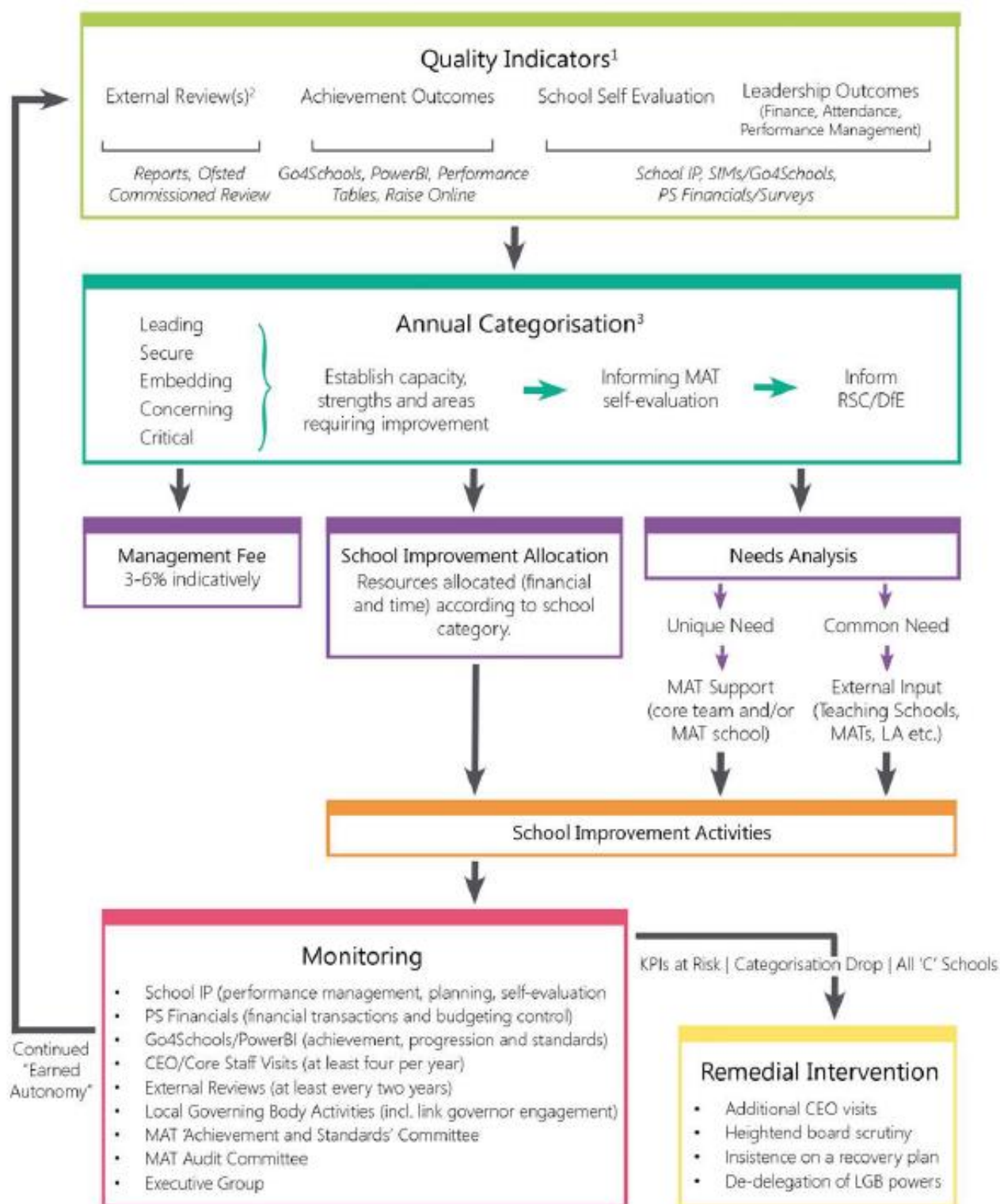
Each school's category – reassessed annually – will be a determinant of the level of support and scrutiny it receives from the Trust for the academic year. However, in-year adjustments can be made, and consequently support and scrutiny may also be adjusted (see flowchart below).

All of the above (categorization and the basis upon which it is made, the extent of support and scrutiny, the areas where improvement is required and the strategies to be deployed) will be communicated to the Local Governing Body of each school by the MAT Central Team, with the MAT Board also informed. These report should be produced no later than October each year – late enough to fully appraise and evaluate outcomes from the previous academic year, but timely enough to allow sufficient impact to be made within the current academic year.

The Framework of Teacher Career Development (see Appendix A) is an effective tool to support improvement in our schools in terms of offering a structure to succession planning and talent management enabling us to:

- Raise the quality of middle and senior leadership
- Establish an ethos of responsibility and initiative throughout the school
- Attract and retain talented staff by offering progression and development

School Improvement Strategy Flowchart

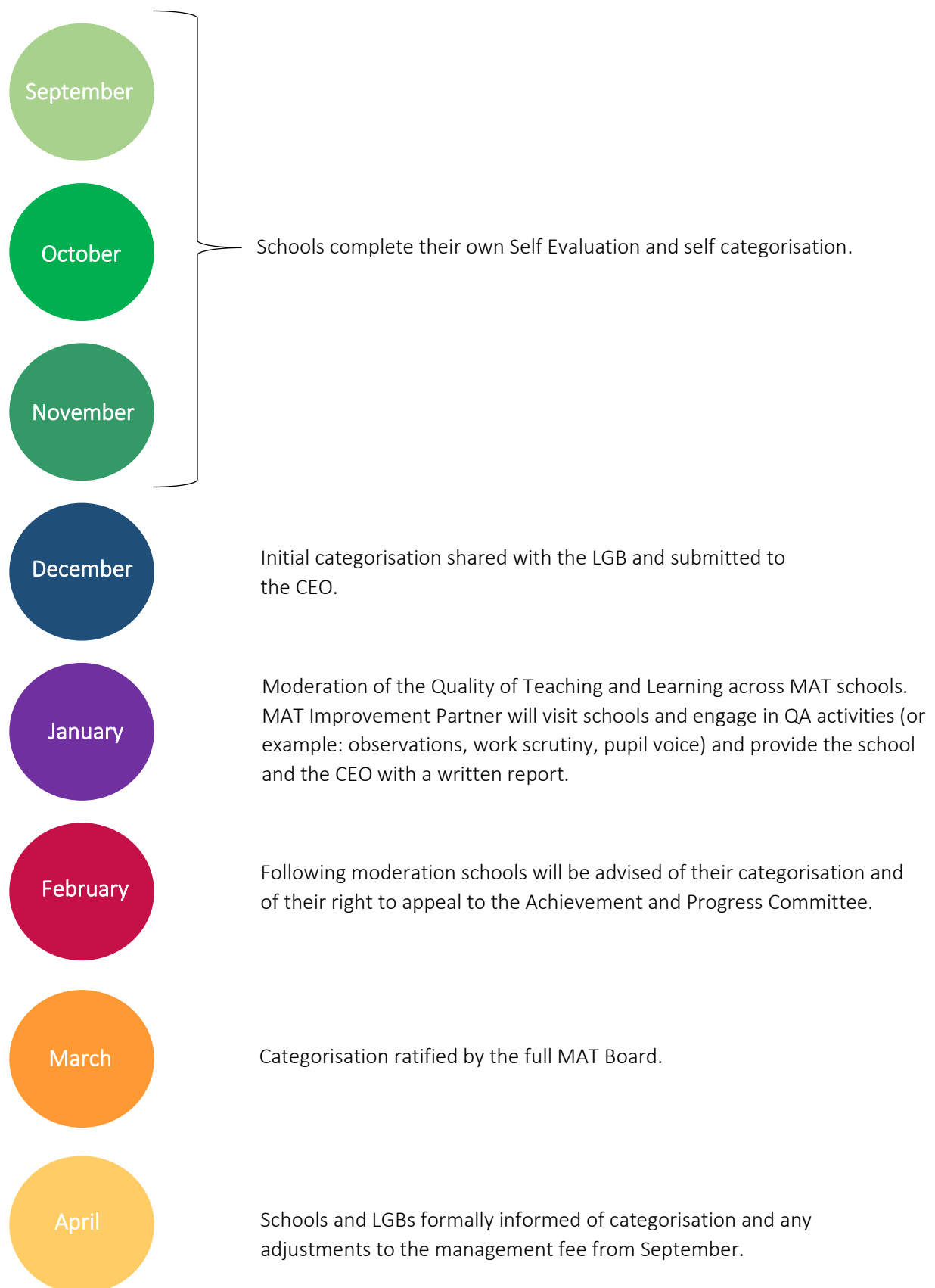


1. At incorporation this would also include 'due diligence' information.

2. No MAT school should have more than two full academic years elapse without external review taking place.

3. Descriptions TBC

Timeline for Categorisation

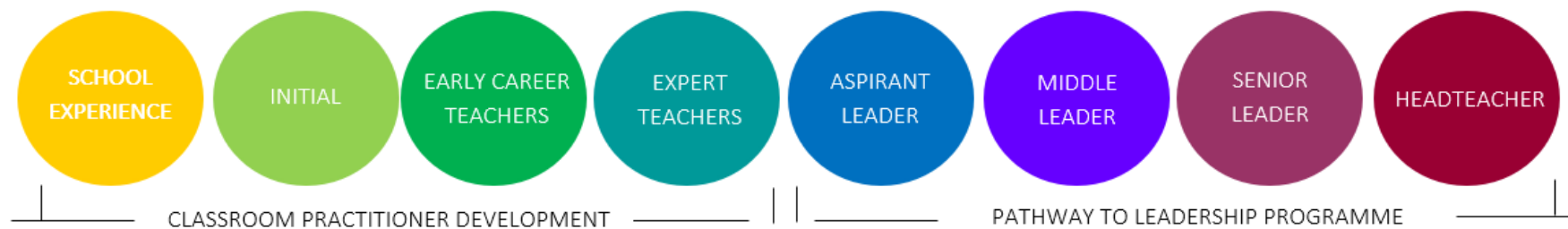




A Framework for Teacher Career Development

OUR VISION is to train new entrants to the profession, support Early Career Teachers to become outstanding practitioners and then develop them to become our inspirational leaders of the future. We recognise the importance of nurturing and retaining talent and have developed a framework for career progression that ensures that all staff have access to high quality CPD and development opportunities that will provide them with opportunities to support their individual career aspirations.

OUR RATIONALE is that effective succession planning and talent management is essential for the JTMAT to ensure that a steady supply of future leaders, managers and outstanding classroom practitioners are equipped to secure the best possible outcomes for young people across our local area and family of schools.



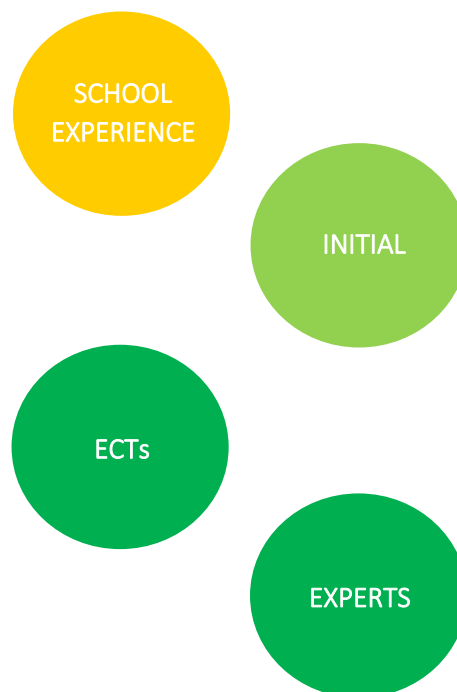
Classroom Practitioner Development

	SCHOOL EXPERIENCE	INITIAL TEACHER EDUCATION	EARLY CAREER TEACHER 1	EARLY CAREER TEACHER 2	EXPERT TEACHER
Who is it for	Post 16 Students	Trainee Teachers	Year 1 ECTs	Year 2 ECTs	Teachers Year 3+
Focus	Encourage current sixth formers to consider teaching as a profession in the future.	High quality training underpinned by the ITT core content framework leading to the award of QTS	Providing high quality professional development through engagement with the Early Career Framework		Ongoing support and development for teachers to become outstanding practitioners with an advanced understanding of pedagogy
Qualities and attributes	<ul style="list-style-type: none"> • A desire to teach or an interest in finding out more about teaching 	<ul style="list-style-type: none"> • Appropriate qualifications. • Potential to teach as identified in application and at interview. 	<ul style="list-style-type: none"> • Award of QTS • Good references • High levels of professionalism 		<ul style="list-style-type: none"> • Consistently good teaching that delivers strong outcomes for pupils. • Alignment and understanding of the school vision & ethos. • Proactive in terms of own professional development
Core CPD entitlement	<ul style="list-style-type: none"> • Presentation about what it means to be a teacher and local training opportunities. • Taster days in the student's preferred phase organised within the MAT 	<ul style="list-style-type: none"> • Programme of Professional Studies • Development of Subject knowledge and subject pedagogy • Effective mentoring • Classroom practice 	<ul style="list-style-type: none"> • Access to regional and local ECF training • Support from an Early Career Framework mentor • Support from ECF MAT Lead 		<ul style="list-style-type: none"> • Ongoing professional development through the TS hub and Research School to support development as an outstanding practitioner • Access to coach
Activities appropriate to stage	<ul style="list-style-type: none"> • Supporting pupils in class • Research the profession and routes into teaching by talking to relevant teachers 	<ul style="list-style-type: none"> • Observing best practice • Team Teaching and • Small group teaching • Whole class Teaching with responsibility for planning delivery and assessment • Engagement in the wider life of school • Completion of PGCE assignment 	<ul style="list-style-type: none"> • Continued observation of best practice throughout the school • Offering support to current trainee • Beginning to take responsibility for own evidence-informed professional development to support classroom practise. 	<ul style="list-style-type: none"> • Continued observation of best practice throughout the school • Offering support to current trainee • Take responsibility for own evidence-informed professional development to support classroom practise 	<ul style="list-style-type: none"> • Reflection and evaluation of impact of your own practice on pupil learning • Engagement in educational research - books, blogs, articles • In year 4 of teaching, become a mentor for a trainee teacher / ECT • Become an examiner • Engagement in inquiry based- learning • Modelling best practice • Contributing to Teach Meets and whole school professional development • UPS teachers make significant and sustained contribution to wider school

Classroom Practitioner Development

To support the national recruitment shortage in teaching, it is important that pupils, as part of a wider careers programme, have appropriate information, advice and guidance about what it means to be a teacher and the various routes into teaching. We aim to do this for those Post 16 students who express an interest or show an aptitude for teaching, through an in-house programme as part of their work experience.

Our Early Career Teachers (ECTs) will have access to a well planned and focused Professional Development Programme that runs throughout the year and effectively builds on their ITT experience. They will be well supported by a professional mentor and a subject mentor to support effective completion of their induction year.



Our Initial Teacher Training (ITT) year is where identification of potential outstanding teachers and leaders really starts. We will support trainees in the acquisition of QTS through the provision of excellent placements, supportive mentoring and an effective training programme which develops both their subject knowledge and pedagogy. It is important to us that our trainees develop an understanding of how pupils learn, the barriers to learning and the theory behind the pedagogy. With this in mind, as part of the programme trainees will complete 3 masters level modules as part of the PGCE.

For teachers who are still at an early stage of their career, or more experienced colleagues who do not aspire to leadership, we recognise the importance of ongoing professional development; to enhance your classroom practice and support your development as an outstanding practitioner.

There is an expectation that every teacher within the JTMAT will become a highly competent classroom practitioner delivering consistently good lessons and securing strong outcomes for pupils. We acknowledge that some staff may not wish to progress beyond this point, but for those seeking advancement in their career, staff may elect to join the **Pathway to Leadership programme** – provided they have demonstrated the required skills level of competence in their classroom teaching.

Pathway to Leadership Programme



EXPECTATIONS:

- Participants must be consistently delivering high quality lessons as evidenced through performance management and other quality assurance activities.
- All participants must have the support of their line manager and be recommended for advancement through the programme as part of their performance management.
- Staff participating in the programme from Aspirant Leaders onwards will be a mentor to participants in the previous phase of development.
- All participants are expected to model best practice and make a contribution to teaching and learning via the repository and participation in events and activities within the MAT and Teaching School Hub.
- Participants should operate an 'open door' policy in their classroom to support the development of others.
- Progression to the next phase is subject to successful performance during the previous phase.
- Participants will be subject to additional lesson observations to support the assessment of their readiness to move to the next phase of their leadership development.

ENTITLEMENT:

- Participants will be assigned a mentor who is an outstanding practitioner with leadership experience.
- Participants will complete Coaching and accredited Leadership Programmes according to their phase of development on the programme.
- As part of their role as a leader participants will be involved in the mentoring and coaching of others.
- To encourage engagement with educational research we will facilitate access to Masters Level study. At all stages of the leadership development programme participants can access a Masters in Teaching and Learning, or Masters in Educational Leadership. Where the focus for the Masters Level study links to a school priority, schools may agree to offer a subsidy.
- The school will identify additional leadership opportunities to support the development of participants.
- Opportunities to work with corroboratively across the MAT and within the Teaching School Hub.

Pathway to Leadership Programme

The

	ASPIRANT LEADER	MIDDLE LEADER		SENIOR LEADER		HEADTEACHER
Who is it for	Teachers with a minimum of 3 years teaching experience.	Recently appointed curriculum area leaders/pastoral leaders or other.	Experienced curriculum area leaders/pastoral leaders or other.	Recently appointed member of SLT	Experienced member of SLT.	Heads of School
Focus	Development of personal leadership attributes and a commitment to improving own competence in Teaching and Learning	Developing leadership qualities, including the ability to influence the practice of others to enhance pupil progress, support, motivate and hold a team to account and be accountable for their subject / area to all stakeholders and the LGB		Leading whole school improvement	Leading whole school improvement Preparation for headship?	Collaborative leadership and leadership beyond own school
Qualities and attributes	<ul style="list-style-type: none"> Consistently good teaching that delivers strong outcomes for pupils. Ownership of own personal development. Alignment and understanding of the school vision and ethos 	<ul style="list-style-type: none"> Potential to improve the performance of the team through effective leadership and development of staff. Personal attributes: Resilience , self-awareness, critical thinking and emotional intelligence Ability to lead and manage a team and successfully implement change Potential to translate the MAT and school vision to the team action plan and hold the team to account. 		<ul style="list-style-type: none"> Potential to act strategically and drive whole school improvement. Experience of successfully securing improvement at middle leadership level. Ability to identify and develop talent in others Ability to lead , manage and implement change 		<ul style="list-style-type: none"> Has a clear vision Has the skills to take colleagues with them Experience of securing improvement and implementing change Focused on T+L and pupil outcomes. Able to support, encourage , mentor and challenge others Is outward facing
Core CPD entitlement	<ul style="list-style-type: none"> Coaching training Observation and feedback training Appropriate professional development offered by RS / TS hub 	<ul style="list-style-type: none"> Access to Specialist NPQs : NPQLT, NPQLBC, NPQLTD Coaching training + access to a coach EEF Training : Putting evidence to work Appropriate professional development offered by RS / TS hub 		<ul style="list-style-type: none"> Access to specialist NPQs /NPQSL Safer recruitment training Coaching training + Access to coach 		<ul style="list-style-type: none"> NPQH NPQEL Mentor (for Heads) Access to a coach
Activities appropriate to stage	<ul style="list-style-type: none"> Mentor (trainees) Coaching others Masters SCITT Tutor Joint practice Development Participation in Teach meets Responsibility for aspect of the DIP Leading on an enhanced curriculum activity UPS teachers make significant and sustained contribution to wider school 	<ul style="list-style-type: none"> Coaching others Masters SCITT tutor Engagement in network meetings Contribution to whole school Professional development UPS teachers make significant and sustained contribution to wider school 		<ul style="list-style-type: none"> Shadowing/secondment opportunities 	<ul style="list-style-type: none"> Coaching new senior leaders Secondment opportunities Leading on areas of CPD across the Trust Leading training on MAT training days 	<ul style="list-style-type: none"> Mentoring a new Headteacher Supporting on a MAT prior Leading on areas of CPD across the Trust/MAT training day?
		<ul style="list-style-type: none"> Engagement in Network meeting SCITT tutor 	<ul style="list-style-type: none"> SLT shadowing Leadership secondment Mentor for less experienced ML 			

Application Process

All staff will automatically progress through the stages of Classroom Practitioner Development and then can choose whether they wish to be considered for the Pathway to Leadership Programme.

In order to progress to the Pathway to Leadership Programme a formal application needs to be made through your SLT link who will consider your application in consultation with the SLT teaching and Learning group. To apply you need to write a letter of application evidencing:

- Consistently good teaching (3 years) that delivers strong outcomes for pupils
- How you have taken ownership of your own professional development and outlining;
 - Your proposal for how you would actively lead learning within your school.



Appendix O – JT MAT : Framework of Effectiveness

External Categorisation

1. Outcomes:
 - KS1 outcomes
 - KS2 outcomes
 - KS4 outcomes
 - KS5 outcomes
2. Leadership and Management
 - Self-Evaluation
 - Compliance and Governance
3. Curriculum
4. Teaching and Learning
5. Behaviour and Climate for Learning

External Categorisation

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
External Review	Recent outstanding judgement Likely to be judged Outstanding	Recent good judgement across all key judgments Likely to be judged good	Good Ofsted but not secure.	RI but capacity to improve	Inadequate – in an Ofsted category
For new Free Schools only: Feedback from DfE monitoring, readiness to open meeting and associated risk register	All feedback is extremely positive with no actions required	Most feedback reports are extremely positive with only low risk items identified for action	Feedback is generally positive with only low risk items identified for action	Despite some positive feedback reports, some actions required are of medium risk (no high risk)	A range of reports identify actions which are high risk

KA1: Outcomes

EYFS Outcomes: Early Years Foundation Stage Profile (KA1-EYFS-1)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Early Years Foundation Stage Profile	The percentage of pupils achieving a good level of development exceeds the percentage of pupils achieving a good level of development nationally and has been consistently so for the last three years	The percentage of pupils achieving a good level of development exceeds the percentage of pupils achieving a good level of development nationally	The percentage of pupils achieving a good level of development is in line with the percentage of pupils achieving a good level of development nationally	The percentage of pupils achieving a good level of development is in line with the percentage of pupils achieving a good level of development nationally and / or there is a concerning trend	The percentage of pupils meeting the expected standard is well below the percentage of pupils meeting the expected standard nationally and has been over time

KS1 Outcomes: Phonics (KA1-KS1-1)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Phonics Outcomes	The percentage of pupils meeting the expected standard exceeds the percentage of pupils meeting the expected standard nationally and has been consistently so for the last three years	The percentage of pupils meeting the expected standard exceeds the percentage of pupils meeting the expected standard nationally	The percentage of pupils meeting the expected standard is in line with the percentage of pupils meeting the expected standard nationally	The percentage of pupils meeting the expected standard is in line with the percentage of pupils meeting the expected standard nationally and/or there is a concerning trend	The percentage of pupils meeting the expected standard is well below the percentage of pupils meeting the expected standard nationally and has been over time

KS1 Outcomes: Reading (KA1-KS1-2)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Expected	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is below the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is well below the percentage for nationally and has been over time

Greater Depth	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is below the percentage for pupils nationally	The percentage of who achieved greater depth at end of KS1 is well below the percentage for pupils nationally and has been over time
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KS1 Outcomes: Writing (KA1-KS1-4)

PRIOR Attainment Band	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Expected	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is below the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is well below the percentage for nationally and has been over time
Greater Depth	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is below the percentage for pupils nationally	The percentage of who achieved greater depth at end of KS1 is well below the percentage for pupils nationally and has been over time

KS1 Outcomes: Mathematics (KA1-KS1-5)

PRIOR Attainment Band	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Expected	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved national standard at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is slightly below the percentage for pupils nationally	The percentage of pupils who achieved national standard at end of KS1 is well below the percentage for nationally and has been over time
Greater Depth	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally and has been consistently so over time	The percentage of pupils who achieved greater depth at end of KS1 is higher than the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is in line with the percentage for pupils nationally	The percentage of pupils who achieved greater depth at end of KS1 is below the percentage for pupils nationally	The percentage of who achieved greater depth at end of KS1 is well below the percentage for pupils nationally with no trend of improvement

KS1: Outcomes for disadvantaged pupils (progress from end of EYFS to end of KS1 using internal tracking)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS1-6 Reading	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points and have been consistently over time	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points	The school can evidence that most disadvantaged pupils are achieving well in relation to their starting points	The school can only evidence that a small number of pupils are achieving well in relation to their starting point despite an improving trend	School evidence indicates that disadvantaged pupils are not achieving well in relation to their starting points
KA1-KS1 – 7 Writing	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points and have been consistently over time	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points	The school can evidence that most disadvantaged pupils are achieving well in relation to their starting points	The school can only evidence that a small number of pupils are achieving well in relation to their starting point despite an improving trend	School evidence indicates that disadvantaged pupils are not achieving well in relation to their starting points
KA1 – KS1-8 Mathematics	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points and have been consistently over time	The school can evidence that all disadvantaged pupils are achieving well in relation to their starting points	The school can evidence that most disadvantaged pupils are achieving well in relation to their starting points	The school can only evidence that a small number of pupils are achieving well in relation to their starting point despite an improving trend	School evidence indicates that disadvantaged pupils are not achieving well in relation to their starting points

* with the exception of isolated outliers

KS2: Progress

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS2-1 Progress Score in Reading: all pupils	Well above average for all pupils	Above average	Average	Below average	Well below average
KA1-KS2-2 Progress score in Reading: disadvantaged pupils	The progress of disadvantaged pupils is in top 10% nationally	The progress of disadvantaged pupils is in the top 20% of schools nationally	The progress of disadvantaged pupils is broadly in line with national	Trend: The progress of disadvantaged pupils is in the bottom 20% nationally but is showing improvement over time	Trend: The progress of disadvantaged pupils is in the bottom 10% nationally and has been for the last 2 years
KA1-KS2-3 Progress score in Writing	Well above average	Above average	Average	Below average	Well below average
KA1-KS2-4 Progress score in Writing: disadvantaged pupils	The progress of disadvantaged pupils is in top 10% nationally	The progress of disadvantaged pupils is in the top 20% of schools nationally	The progress of disadvantaged pupils is broadly in line with national (Q3)	The progress of disadvantaged pupils is in the bottom 20% nationally but is showing improvement over time	The progress of disadvantaged pupils is in the bottom 10% nationally and has been for the last 2 years
KA1-KS2-5 Progress score in Maths	Well above average	Above average	Average	Below average	Well below average
KA1-KS2-6 Progress score in Maths: disadvantaged pupils	The progress of disadvantaged pupils is in top 10% nationally	The progress of disadvantaged pupils is in the top 20% of schools nationally	The progress of disadvantaged pupils is broadly in line with national (Q3)	Trend: The progress of disadvantaged pupils is in the bottom 20% nationally but is showing improvement over time	Trend: The progress of disadvantaged pupils is in the bottom 10% nationally and has been for the last 2 years

KS2 Attainment

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS2-7 Reading	The percentage of pupils achieving the expected standard is above the national and has been over time	The percentage of pupils achieving the expected standard is above national	The percentage achieving expected standard is in line with national	The percentage achieving the expected standard is below national	The percentage achieving the expected standard is below national and has been over time
KA1-KS2-8 Maths	The percentage of pupils achieving the expected standard is above the national and has been over time	The percentage of pupils achieving the expected standard is above national	The percentage achieving expected standard is in line with national	The percentage achieving the expected standard is below national	The percentage achieving the expected standard is below national and has been over time

KS3 Progress

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS3-1 English: Progress against targets	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are securely positive against target with no significant variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets.	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are within an agreed tolerance of 0* but with some possible variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets.	The school can demonstrate that targets are generally challenging. Outcomes are variable between classes however and this has a negative impact on the overall subject residual, which is just out of tolerance. There is some evidence of the impact of timely intervention where pupils are not making desirable progress and / or effective, challenge through the raising of targets.	The school's target setting process lacks the necessary rigour and challenge and consequently outcomes data raises questions re reliability. The school can articulate how they intervene to support or challenge pupils but can offer limited evidence of impact.	There is no rigorous target setting process in place and as a result the outcomes data is unreliable. There is no evidence of challenge or effective interventions to support achievement.

KA1-KS3-2 Maths: Progress against targets	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are securely positive with no significant variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets.	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are within an agreed tolerance of 0* but with some possible variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets	The school can demonstrate that targets are generally challenging. Outcomes are variable between classes however and this has a negative impact on the overall subject residual, which is just out of tolerance. There is some evidence of the impact of timely intervention where pupils are not making desirable progress and / or effective, challenge through the raising of targets.	The school's target setting process lacks the necessary rigour and challenge and consequently outcomes data raises questions re reliability. The school can articulate how they intervene to support or challenge pupils but can offer limited evidence of impact.	There is no rigorous target setting process in place and as a result the outcomes data is unreliable. There is no evidence of challenge or effective interventions to support achievement.
KA1-KS3-3 Science: Progress against targets	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are securely positive with no significant variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets.	The school can demonstrate that targets set are always challenging and reliably informed by a range of data sets. Average outcomes are within an agreed tolerance of 0* but with some possible variation between classes. There is evidence of the impact of timely intervention where pupils are not making desirable progress and effective, impactful challenge through the raising of targets	The school can demonstrate that targets are generally challenging. Outcomes are variable between classes however and this has a negative impact on the overall subject residual, which is just out of tolerance. There is some evidence of the impact of timely intervention where pupils are not making desirable progress and / or effective, challenge through the raising of targets.	The school's target setting process lacks the necessary rigour and challenge and consequently outcomes data raises questions re reliability. The school can articulate how they intervene to support or challenge pupils but can offer limited evidence of impact.	There is no rigorous target setting process in place and as a result the outcomes data is unreliable. There is no evidence of challenge or effective interventions to support achievement.
KA1-KS3-4 Progress of disadvantaged (where a meaningful sized cohort)	Outcomes for disadvantaged pupils are positive and in line with the progress of other pupils in the year group. This has been sustained over time	Outcomes for disadvantaged pupils are positive and in line with the progress of other pupils in the year group.	Disadvantaged pupils make less progress than others in the year group but there is an improving trend	Disadvantaged pupils make progress below other pupils in the year group	Disadvantaged pupils make progress well below other pupils in the year group

KS4 PROGRESS (as per the ASP)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS4-1 Progress 8 all pupil	Well above average	Above average	Average	Below average	Well below average
KA1-KS4-2 Progress of Disadvantaged*	Disadvantaged pupils make progress in line with the progress of other pupils nationally and this has been sustained over time **	Disadvantaged pupils make progress in line with the progress of other pupils nationally.	Disadvantaged pupils make progress below other pupils nationally, but there is an improving trend	Disadvantaged pupils make progress below other pupils nationally	Disadvantaged pupils make progress well below other pupils nationally
KA1-KS4-3 Progress of other learner groups (i.e gender and ability groups)	All other learner groups* exceed the progress made by other pupils nationally.	Most other learner groups exceed the progress made by other pupils nationally.	Most other learner groups make progress broadly in line with the progress made by other pupils nationally.	Most other learner groups make progress below the progress made by other pupils nationally.	All other learner groups make progress significantly below the progress made by other pupils nationally.
KA1-KS4-4 Progress Score: A levels	Well above average	Above average	Average	Below average	Well below average
KA1-KS4-5 Progress Score: Vocational	Well above average	Above average	Average	Below average	Well below average

KS4 ATTAINMENT (as per the IDSR)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS4-6 Attainment 8 all pupil	Attainment 8 is in Quintile 1 or 2 and has been over time	Attainment 8 is in Quintile 1 or 2	Attainment 8 is in quintile 3	Attainment 8 is in Quintile 4	Attainment 8 is in Quintile 4 or 5 and has been over time

KS5 PROGRESS

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS5-1 Progress Score: A levels	Well above average	Above average	Average	Below average	Well below average
KA1-KS5-2 Progress Score: Vocational	Well above average	Above average	Average	Below average	Well below average

KS5 ATTAINMENT (as per the IDSR)

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA1-KS5-3 A level APS	APS is in Quintile 1 or 2 and has been over time	APS is in Quintile 1 or 2	APS is in quintile 3	APS is in Quintile 4	APS is in Quintile 4 or 5 and has been over time

*Only to be evaluated where the size of the cohort is meaningful

** Overtime = 3 years

KA2 – Leadership and Management

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA2-1 Building vision and setting direction	Absolute clarity of purpose and priorities beyond the school itself- the wider community can articulate what the school stands for and where it is going through the explicit messages it sends and its actions. The vision, which is underpinned by shared values, moral purpose and sustainability drives the school improvement plan	All stakeholders are clear about the direction in which the school is heading, and can see their part in moving the school towards that vision. It is articulated regularly, and leaders at all levels drive forward strategies that are commensurate with and contribute towards the vision.	Vision is evident in aspects of the school improvement plan, and staff can see how operational work can move the school towards longer term ambitions. This may be piecemeal and poorly defined. Stakeholders beyond the immediate staff (students, parents, governors) may be unclear on the key features of the vision.	A vision statement is articulated, but not referred to or re-visited regularly. It is not exemplified in the leaders' activities, and is not moved forward via the school improvement plan. Most stakeholders, including most staff, are unclear where the school aspires to be.	The school operates pragmatically only, where immediate priorities override any strategic aspirations.
KA2-2 Culture	Almost all stakeholders exemplify	The school has a prevailing culture	The school promotes values and	The school has a diversity of	The prevailing culture of the school is

	the positive culture of the school in all they do. It pervades their work, their interactions, and even influences their lives outside of the school community. It is a genuine force for good, and is robust to the challenges from 'outliers' within the school, and from threats it faces beyond the school itself.	that is positive, inclusive and productive – commensurate with its values. This culture is reinforced regularly with all stakeholders through both formal mechanisms and the purposeful role modelling of leaders at all levels. Those who embrace this culture feel a sense of belonging and pride. Those who do not are invited to respond positively – but are actively challenged when they do not.	a positive culture through formal approaches and through the positive role modelling of many of its leaders. Attempts are made to tackle negative sub-cultures, with some success.	cultures within it, and staff and children all feel comfortable within the culture they inhabit – whether it is positive or negative. Negative cultures are identified but not actively challenged. The school corporately does little if anything to even guide students and staff towards the behaviours and attitudes it wishes them to exhibit.	one of low expectations and low aspirations. Optimism is limited, and staff and pupils undertake work to avoid negative consequences.
KA2-3	The School works collaboratively to support the MAT culture and ethos, always sharing best practice, participating in networking opportunities at both senior and middle leadership level, and contributing extensively to both the Teaching and Learning repository and MAT training days	The School works collaboratively to support the MAT culture and ethos, sharing best practice, participating in most networking opportunities and contributing to the Teaching and Learning repository and MAT training days	The School works collaboratively and is supportive of the MAT culture and ethos. The concept of sharing of best practice either through networking, contributions to the Teaching and Learning Repository or MAT training days is beginning, but not fully embedded.	The School is supportive of the MAT culture and ethos but there is very limited evidence of where the school has been prepared to share best practice, either through contributions to the Teaching and Learning Repository or MAT training days	The School is supportive of the MAT culture and ethos but there is no evidence of where the school has been prepared to share best practice, either through contributions to the Teaching and Learning Repository or MAT training days
KA2-4 Developing people	Leaders are ever mindful of the professional development needs and well-being of the staff to build capacity for the future. Leaders successfully develop impressive leaders to succeed them, and succession planning is an active consideration in all recruitment and staff development matters. All teams perform at similarly high standards. The school actively evaluates activities and events, and seeks colleagues' views, to ensure that staff work-life balance is preserved and and	Leaders at all levels develop the skills and abilities of their followers, who are keen to learn more through active coaching and mentoring. There are few discernible variations in the performance of teams. The school is mindful of employees' capacity and work-life balance when planning and initiating activities and events. Staff wellbeing is surveyed, and feedback from individuals is acted upon where appropriate.	Leaders at all levels are able to draw upon experience and their leadership training, much of it accredited, to support highly productive teams that deliver a track record of improvement or sustained success. Inter-team variance is limited. The school monitors its activity, especially for teaching staff, against requirements contained in recommendations and agreements (e.g. STPCD). It is responsive to feedback from colleagues, but this is unsolicited.	Leaders support their colleagues to deliver meaningful outcomes. They attempt, but only sometimes successfully, to make teams more harmonious, cohesive and productive. This is demonstrated through a considerable variance of outcomes by subject or team. The school is responsive to staff concerns regarding work-life balance, but only in a reactive manner e.g. as a result of OHU referrals or staff absences.	Leaders are not influential over the work and success of others. They use their positional power, unconsciously or even consciously, to hold colleagues back. Outcomes for pupils are low, as is staff retention and morale. The school is unresponsive to the issue of staff work-life balance or wellbeing.

	staff. Staff feedback re. support for professional development and consideration re. wellbeing is highly positive.				
KA2-5 Performance Management	Performance management has a demonstrable impact on professional standards over time. It is used to support and develop all staff effectively, providing a structure of support and development opportunities as appropriate. Retention rates are high and recruitment is rarely problematic	Performance management is used to support and develop all staff effectively providing a structure of support and development opportunities as appropriate.	Performance management is used to support and develop all staff but ensuing actions are not always followed through with rigour.	Leaders are only just beginning to use Performance Management as a tool for staff development and improvement.	Performance management is ineffective and not focused on staff development.
KA2-6 Change Management Redesigning the organisation	Change is embraced and viewed positively as an opportunity for corporate improvement and individual growth. The school is frequently an early adopter of changes, as it constantly scans the environment effectively in order to anticipate forthcoming areas for strategic choice. Leaders at all levels and their teams exhibit this, and the active pursuit of improvement opportunities is a major contributory factor in the school's high expectations and outcomes.	The school responds briskly and optimistically, carrying stakeholders with them as a result of significant amounts of trust based on a proven track record for making the right strategic choices at the right times. Risks are accurately appraised and mitigated skilfully. Most teams and leaders at all levels reflect this in their own planning and improvement trajectory.	The school is neither averse to nor positive about change. It sees change as inevitable and often desirable, and will be comfortable to follow in the slipstream of more influential schools, and run with the herd. It is rarely left behind, and whilst it does not benefit from first mover advantages, it is not blighted with the reputational and organisational damage of the late adopter. There is a variance of attitude within the school – with some leaders and their teams moving ahead with change far more briskly than others.	Change is viewed with caution, and the school and its leaders require significant evidence of demonstrable impact in contexts similar to their own before moving forward. They are risk averse, and will prefer to move forward slowly but smoothly rather than accelerate and encounter issues. This manifests itself in 'coasting' or 'country club' perceptions of a 'cosy' school – lacking drive or passion to improve. There may be pockets of innovation within some teams, but this is not celebrated or recognised as more widely applicable or desirable.	The school and its stakeholders are resistant to change, viewing it as carrying greater risk than reward, and seeing the costs (e.g. additional work) as greater than potential benefits. As a result, it is often a late adopter when the benefits of early change have long past – and this reinforces their view that change brings disappointment. This is evident in all teams within the school, and amongst leaders at all levels.
KA2-7 Leading teaching & learning	School leaders maintain teaching and learning as their core focus. A Teaching and Learning approach and good practice guide set down clear expectations of what should happen in the classroom. There are robust procedures for monitoring and evaluating the quality of teaching and learning	Teaching and learning is a key priority for the school community and its leaders. There are clear expectations and a standard that teacher performance is monitored against. A significant majority of teachers perform at or above this standard, and where there is underperformance it is	Teaching and learning is a priority for many leaders throughout the school, but not all. Focus upon monitoring standards and securing improvement can become obscured by other priorities, such as behaviour. As a result, teacher underperformance is tolerated for longer than in more effective schools, and pupil	Teaching and learning is seen as an identified priority to named individuals only. There is a lack of corporate responsibility in the need to monitor standards and challenge underperformance. This may be as a result of lack of confidence in appraising standards, or the integrity issues faced when leaders are themselves	Teaching and learning is not seen as a priority for the majority of leaders at all levels. There is a lack of understanding of what excellence looks like, and therefore there is no articulated standard against which teachers and pupils can be assessed. As a result, there is no concept of

	and tackling underperformance.	challenged and remedied.	underachievement may go unchecked for longer.	poor classroom practitioners. Underperformance is seen as variance, and some pupils' underachievement is seen as inevitable.	underperformance. There will be limited quality first teaching, and those who do teach well are not recognized for their skill or commitment. Teacher retention is high for the less competent as they are unchallenged, and retention is low for the skilful as they search for development and fulfilment elsewhere.
KA2-8 Assessment	Assessment is regular, aligned to the curriculum and the demands pupils will face when assessed externally. It enables pupils, their parents and staff to clearly identify knowledge, skills and attributes that have been developed, how these compare to pupils' peers in school and nationally, and the next steps that are required for further achievement to be secured.	Assessment is regular and informative, with most pupils and parents being able to accurately identify areas of strength, areas still to be learned, and they can articulate with some confidence what is required to bridge the gap	. Assessment and reporting meet statutory requirements, but the approach adopted may be inconsistent and unclear to some stakeholders.	Assessment is lacking coherence or purpose, and reporting is not helpful in driving forward progress	Assessment is sporadic and cursory, and reporting may not meet statutory requirements.
KA2-9 Systems Efficiency and organisational effectiveness	Clarity of roles, coherence of systems and the pace at which they operate generates efficiency and precision throughout all administrative functions. Audits are clean, external reviews of compliance related organisational activities are overwhelmingly positive in outcome. Where areas for improvement are identified they are minor, and addressed promptly. Teams are highly functioning, and all stakeholders are clear where responsibility and accountability lie. Administrators are proud of the part they play in the success of the school, and seek out professional growth opportunities. Finances are well-managed by all budget holders	The school is well managed, with savings regularly identified through a continual scrutiny of systems and processes. There are clear structures in place that work, with roles and responsibilities that are effectively deployed to colleagues who are sufficiently skilled and experienced to undertake them well. Retention rates are high, and succession planning and contingency arrangements are highly developed. Audits and reviews are largely positive, with few issues that are materially significant arising, and they are in areas known to the school. Finances are well-managed centrally and by most budget-holders. The	Structures are in place to meet all compliance requirements, which the school almost always does. Roles are allocated, but there may be doubt within and across teams as to where responsibility and accountability lie. Efficiencies are found, but in an ad hoc rather than via a systemic culture of scrutiny and the pursuit of improvement. Staff are competent, but may not aspire to professional growth. Succession planning is not considered sufficiently to avoid gaps in processes when absences or vacancies arise. Audits and reviews can be challenging, occasionally with outcomes that come as a surprise to the school. Finances are fragile, but the school can function within its	Notional structures and systems are in place for key administrative and compliance functions. However, there is a lack of clarity from all stakeholders, including post-holders within such systems where remits, roles and responsibilities begin and end. Accountability is often shared or deflected. Audits and reviews regularly identify major shortcomings, many of which are not foreseen by the school. Efficiencies are clearly evident, but only the most obvious areas are identified, and the easiest of those areas addressed. Staff turnover is high as ambitious	Managerial processes are absent, with lack of clarity over roles and responsibilities. Priorities are confused and systems are inefficient. Audits and reviews are damning, and create turbulence and reputational damage. Issues identified are often left unaddressed. Systems are inefficient, with staff deployment and technical solutions poorly aligned to the required tasks. Systems are ripe for efficiency savings, but there is neither the expertise nor the desire to find them. Staff turnover is typically low, as there is little ambition for professional growth and ineffectiveness goes unchallenged.

	and centrally, with best value being achieved.	school is in control of its finances and can move forward with confidence.	means.	individuals become frustrated and leave. The school struggles to function within its means financially, and deadlines may not be met for payments. Some budget holders cannot manage their funds effectively.	Finances are a concern – the school may be running a significant deficit, it may regularly settle its debts late, and may be subject to compliance issues and even malpractice, misappropriation and fraud.
KA2-10 Financial health	The school has an in- year budget which would generate a modest surplus. Its expenditure on staffing is below that expressed as a ceiling in the MAT's target KPI. The school has a strong level of historical reserves (comparable for its size).	The school has an in-year balanced budget. Its expenditure on staffing is in line with the MAT's target KPI. The school has a modest level of historical reserves (comparable for its size).	The school has an in-year balanced budget. Its expenditure on staffing is currently above the ceiling set in the MAT's target KPI. The school has a small historical reserve (comparable for its size).	The school struggles to set an in-year balanced budget and has limited, or rapidly depleting, historical reserves. Without restructure, the school is vulnerable to financial problems in the event of unforeseen or external issues.	The school has a structural deficit, insufficient historical reserves and a recovery plan that is either insufficient to deliver the required outcome or will do so with drastic consequences to the school's operations.
KA2-11 Reputation and influence beyond organisation	Outward facing system leadership. The school is recognised for its work nationally and even internationally. A credible voice for change, and an influential force in system leadership.	The school has a regional presence and is influential at District or County level. It will lead initiatives, chair local forums, steer collaborations and strategic projects, and others will be comfortable in following and engaging.	Locally significant – the school is a valued partner, with intimate knowledge of neighbouring schools – their strengths and weaknesses. A 'go to' source of advice for other schools, and a school that plays a proportionate role in local arrangements e.g. around inclusion.	School collaborates locally and is aware of managing relationships with its neighbouring schools, which it does so actively and positively. The school tends to follow the lead of more influential schools in the locality who are more successful and/or strategically connected.	The school is inward-facing, reactive to the strategies of others. It is not held in high esteem by its local community, or the local family of schools. This may be reflected in admissions numbers and staying on rates.

*Includes teaching and support staff

KA2 - Self-Evaluation

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA2-12 Range of evidence	A full range of evidence, focused on pupil outcomes is used to inform the Self-evaluation (pupil performance data, lesson observations, work scrutiny, learning walks, schemes of learning, staff, pupil and parent voice)	A broad range of evidence, focused on pupil outcomes is used to inform the Self-evaluation (pupil performance data, lesson observations, work scrutiny, learning walks, schemes of learning, staff, pupil and parent voice)	The school is developing quality assurance systems, focused on pupil outcomes, which provides evidence for the school self-evaluation	The school is just beginning to make use of quality assurance activities as an evidence base for self-evaluation	Inadequate evidence base for self-evaluation
KA2-13 Use of evidence	A wealth of evidence is collated, triangulated and skilfully synthesized, culminating in a forensic and accurate assessment of the school's strengths and areas for development across all areas	A broad range of evidence is collated and triangulated, culminating in an accurate assessment of the school's strengths and areas for development across all key areas	The school collates and triangulates a range of evidence, resulting in an accurate assessment of strengths and areas for development across most key areas	Collation and triangulation of evidence is not well developed, resulting in self evaluation which is less accurate and secure across several key areas	Lack of collation and triangulation of evidence has resulted in an inaccurate self evaluation and assessment of the schools strengths and weaknesses
KA2-14 Use of data	Use of data is habitual by all school teams. Systematic data collection and analysis informs self-evaluation	Use of data is habitual by most school teams. Systematic data collection and analysis informs self-evaluation	Data is collected and analysed regularly and used to support school self-evaluation	The school uses high level school data to inform the self-evaluation but collection and analysis of data is not systematic or habitual within all teams	School pays insufficient regard to data to inform the self-evaluation
KA2-15 Stakeholder voice	School regularly and routinely collects views from all stakeholder groups including Governors, SLT, learners, teachers and parents.	School collects views from all stakeholder groups including Governors, SLT, learners, teachers and parents.	The school collects views from a range of stakeholder groups which supports self-evaluation but this is sporadic or reactive and not strategically planned	The school does gather views of a limited number of stakeholder groups, though there is little evidence that it supports effective self-evaluation	School does not seek to gather the views of stakeholders

KA2-16 Impact of Professional Development	The school can effectively and extensively evidence the impact of professional development on the quality of teaching as reflected in pupil outcomes	The school can evidence the impact of professional development on the quality of teaching as reflected in pupil outcomes	The school identifies professional development needs to support the quality of teaching and pupil outcomes but is yet to evidence impact.	Limited evidence of the impact of professional development on the quality of teaching as reflected in pupil outcomes	The school is unable to evidence the impact of professional development on the quality of teaching as reflected in pupil outcomes
KA2-17 National benchmarking	Comprehensive use is made of national comparative data, including data on pupil performance, finance, staffing, attendance, exclusions and the impact of other extended services	Use is made of national comparative data including data on pupil performance, finance, staffing attendance, exclusions and the impact of extended services	Some use is made of national comparative data including data on pupil performance, finance, staffing, attendance, exclusions and the impact of extended service	Limited use is made of national comparative data including data on finance, staffing, attendance, exclusions and the impact of extended services	No reference made to national comparative data
KA2-18 Accuracy of Self- evaluation and link to the School Improvement Plan	Accurate, aspirational but realistic Areas for Development inform the SIP	Accurately identified Areas for Development inform SIP priorities	Areas for development generally feed in to the SIP	There is limited correlation between the identified areas for development in the SEF and the SIP priorities	Identified areas for development not carried over to the School improvement plan

KA2 – Compliance and Governance

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA2-19 Compliance	All financial, regulatory and health and safety areas show a high degree of compliance. Health and safety inspections rate the school well (4 or 5) Safeguarding is judged to be effective. Strategic and operational risk registers are current, appropriate and well reviewed. Critical incident planning and business continuity mitigations are in place and effective – being subject to regular review and testing.	No high-level risks identified at audit, and few risks identified at all. Health and safety inspections rate the school as compliant (3 or 4) Safeguarding is judged to be effective. Strategic and operational risk registers are largely effective, and subject to review. Critical incident planning and business continuity planning is evident – but may not be subject to regular bench-testing, calling into question its effectiveness.	No more than one high level risk identified at audit. Health and safety inspections rate the school at 3 overall. Safeguarding is judged to be effective. Strategic and operational risk registers are in place, but their validity accuracy and currency is questionable, as is the timeliness of any reviews. Critical incident and business continuity plans are rudimentary and superficial, based primarily on external	No more than two medium and one high level risk identified at audit. Health and safety inspections rate the school quite poorly (2) Safeguarding is broadly effective, but there may be areas worthy of improvement. A strategic or operational risk register may not be in place. Risk is managed, but without reference to these key documents. There are plans in place to manage crises, but these are not well articulated, shared or reviewed.	Audit is either not in place, or if it is it identifies several or many risks – including high level risks. Health and safety inspections rate the school poorly (1) Safeguarding arrangements are ineffective. Risk is not effectively managed, and the concept is not embedded in the school's culture or systems. There are no plans in place to manage crises or attempts made to continue the school's operations in the event of a major disruption

			documents and templates.		
KA2-20 Governing Body – Skills and composition	The governing body is fully populated, with the diversity of skillsets required for effective governance. There is clear evidence of skills auditing, and succession planning is actively considered. Governors may include NLGs or individuals of similar reputational stature.	The governing body is fully populated, with the diversity of skill sets required for effective governance. There is evidence of skills auditing, and succession planning has been demonstrated over recent years.	The governing body has limited vacancies that are quickly filled appropriately. There is a diversity of skill sets covering most areas required for effective governance. There is consideration given to filling skills gaps.	The governing body has several vacancies that are not quickly filled. There is a diversity of backgrounds of governors, but their skills are not actively considered in terms of the areas required for effective governance. Succession is ad hoc and based on availability and willingness as opposed to capability.	The governing body has long standing vacancies. There is limited capacity to undertake the duties required for effective governance. There is no consideration given to filling skills gaps. A review of governance has been insisted upon either by Ofsted or the local authority.
KA2-21 Governor training and development	Governor training needs are appraised annually via skills audit, and regularly reviewed as a standing item at governors' meetings. This audit is forensically used to inform training needs. Governors are active in their own development, which may include both formal training and shadowing other governors in other bodies, or the role of the Chair. Governors will attend the MAT governance events in considerable numbers.	Governor training needs are appraised annually via skills audit and used to inform training. Governors are active in their own development, which may include formal training, for which governors give their time generously. Governors will attend the MAT governance events, ensuring the school is reasonably represented.	Governor training needs are appraised annually and used to inform training. Governors are active in their own development, which may include formal training, although this may be irregular and somewhat ad hoc – based on availability as much as need. A small minority of governors from the school will attend the MAT governance events.	Governor training needs are appraised annually and may be used to inform training if the individual promotes this. Some governors are active in their own development, which may include formal training, although this may be irregular and somewhat ad hoc – based on availability as much as need. Others may have limited or no interest in development. Governing body representation from the school at MAT governance events is sporadic.	Governor training needs are not appraised in a systematic or regular way. Some governors may be active in their own development, which may include formal training, although this may be irregular and somewhat ad hoc – based on availability as much as need. Others – perhaps the majority - have limited or no interest in development. Governing body representation from the school at MAT governance events is infrequent.

KA3- Curriculum and Broader educational Offer

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA3-1 Effectiveness of the curriculum	The curriculum prepares the overwhelming majority of pupils exceptionally well for the next stage in their lives. It has an integrity in terms of striving to meet the needs of all pupils whilst also ensuring achievement of whole school key performance indicators are not compromised.	The curriculum is effective in preparing the vast majority of pupils for the next phase of their lives. It helps pupils make expected progress and helps the school to achieve at least average performance in all accountability measures, and above average in several.	The curriculum is effective in preparing the vast majority of pupils for the next phase of their lives. It enables most individuals and groups to make expected progress, and some may exceed this. However, there is a misalignment between the curriculum and meeting the needs of all learners, as demonstrated by variability of progress.	The curriculum meets statutory requirements. However, pupil outcomes indicate that it does not prepare them sufficiently well for the next phase of their lives when compared to their peers elsewhere.	Curriculum provision does not prepare pupils adequately for the next phase of their lives external. Little regard is paid either to the needs of different learner groups or the national key performance indicators.
KA3-2 Key skills	Opportunities to support the development of pupils' literacy and numeracy are audited and exploited effectively across all areas of the curriculum	Opportunities to support the development of pupils' literacy and numeracy are audited and exploited in most areas of the curriculum	Literacy and numeracy skills are audited. The most obvious opportunities to develop them are realised, but others are missed	Opportunities to support the development of pupils' literacy and numeracy are limited beyond English and Maths	The development of literacy and numeracy skills has not been audited and there is no evidence of the promotion of these skills beyond English and Maths
KA3-3 Wider curriculum – careers guidance, personal health and relationships, British Values etc.	There is suitable provision of appropriate health and relationship and careers guidance learning. The curriculum is rich in terms of pupils' social, moral, spiritual and cultural development with opportunities highlighted in schemes of work.	Health and careers education are effective, and their impact is significant as evidenced by the school. The school pays due regard to pupils' social, moral, spiritual and cultural development.	Provision is compliant, but little more.	The wider curriculum, and extra-curricular opportunities are limited in scope and ad hoc. There are limited opportunities for pupils' social, moral, spiritual and cultural development.	There is little evidence that the curriculum supports pupils' literacy and numeracy skills or provides appropriate careers or health and relationship guidance. Social, moral, spiritual and cultural development.

KA3-4 Careers	The school uses appropriate national benchmarking tools (i.e. the Gatsby career benchmark) to great effect	The school uses appropriate national benchmarking (i.e. the Gatsby career benchmark) and meets most of the features of effective practice	The school is beginning to use appropriate national benchmarking (i.e. the Gatsby career benchmark) and meets some of the features of effective practice	The school pays minimal regard to national benchmarking (i.e. the Gatsby career benchmark) meeting only a few of the features of effective practice	Careers information advice and guidance is inadequate.
KA3-5 Enrichment / Extra-curricular opportunities	The wider curriculum and extra-curricular opportunities are considerable**, and are used by the school to augment its taught curriculum very well. Extracurricular provision is mapped out and pupils' involvement in extra-curricular recorded.	The wider curriculum and extra-curricular opportunities are considerable, and are used by the school to augment its taught curriculum well.	There are a range of extra-curricular activities with good levels of take up.	There are limited opportunities for pupils to participate in extracurricular opportunities.	Extra-curricular provision is very limited.
KA3-6 Leadership of the curriculum	Curriculum leadership is dynamic. The curriculum is regularly and systematically evaluated and reviewed with meaningful changes made to support school improvement and ensure the above remain. All leaders (senior and middle leaders) can talk with confidence about curriculum intent, implementation and impact	The curriculum is well-conceived, and leaders regularly review its effectiveness to support maintenance of the above and make adjustments. Nearly all leaders (senior and middle leaders) can talk with a degree of confidence about curriculum intent, implementation and impact	Curriculum leadership is not dynamic but more concerned with the management and maintenance of existing courses. Curriculum planning is regular, but not always forensic in detail, and risk aversion can limit outcomes as the school rejects opportunities to make adjustments promptly. A number of leaders (senior and middle leaders) are unable to articulate with confidence curriculum intent implementation and impact	The curriculum will be adjusted by school leaders, but often this will be reactive and as such there will be a lag before the impact of any changes are felt upon pupil learning or school performance. Most leaders (senior and middle leaders) are unable to articulate curriculum intent implementation and impact	There is no process in place for reviewing the curriculum. The school cannot evidence impact of the effectiveness of the curriculum in any key stage or the long-term impact upon its pupils. Leaders (senior and middle leaders) are unable to articulate curriculum intent implementation and impact

*When considering breadth and balance the MAT will give due regard to statutory requirements as well as the needs and interests of learners and future employers. A broad and balanced curriculum will inspire pupils to learn and offer a range of subjects, courses and opportunities which will help all pupils acquire knowledge, understanding and skills in all aspects of their education - , academic, social and creative.

** opportunities extend beyond performing arts and sport and will provide opportunity for pupils to try a number of new experiences for the first time, or to invest in developing their aptitude in a particular area, helping them socialize, learn new skills and develop their talents and personal attributes such as resilience and leadership

KA4 – The quality of Teaching, Learning and Assessment

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA4-1 Historical Progress	Historical data suggests that progress is LEADING	Historical data suggests that progress is SECURE	Historical data suggests that progress is EMBEDDING	Historical data suggests that progress is CONCERNING	Historical data suggests that progress is CRITICAL
KA4-2 Current progress EYFS	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-3 Current progress KS1	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-4 Current progress KS2	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-5 Current progress KS3	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-6 Current progress KS4	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-7 Current progress KS5	85% of pupils are on track to achieve or exceed their target.	80% of pupils are on track to achieve or exceed their target	70% of pupils are on track to achieve their target	Only 60% of pupils are on track to achieve their target	Less than 60% of pupils are on track to achieve their target
KA4-8 Current progress: Disadvantaged pupils	There is no predicted gap between the progress of disadvantaged pupils and other pupils in school	The gap between the progress of disadvantaged pupils and other pupils in school is very small and closing	The gap between the progress of disadvantaged pupils and other pupils in school is closing	The gap between the progress of disadvantaged pupils and other pupils in school is improving but remains a concern	The gap between the progress of disadvantaged pupils and other pupils in school is a significant cause for concern
KA4-9 Current progress of pupils with SEND	The school can evidence that all SEND pupils are achieving well in relation to their starting points and have been consistently over time	The school can evidence that all SEND pupils are achieving well in relation to their starting points	The school can evidence that most SEND pupils are achieving well in relation to their starting points	The school can evidence that only a few SEND pupils are achieving well in relation to their starting points despite a trend of improvement	School evidence indicates that SEND pupils are not achieving well in relation to their starting points.

KA4-10 Current progress of other groups (gender + prior ability)	The school can evidence that all other pupil groups are achieving well in relation to their starting points and have been consistently over time	The school can evidence that all other pupil groups are achieving well in relation to their starting points	The school can evidence that the majority of other pupil groups are achieving well in relation to their starting points	The majority of other pupil groups are not achieving well in relation to their starting	Evidence indicates that other pupil are not achieving well in relation to their starting points
KA4-11 Current progress: In school variation	There is no significant in school variation in achievement between subjects, year groups or phases	Slight in school variation in achievement between either subjects, year groups or phases	Slight in school variation in achievement across subjects, year groups and phases	Some in school variation in achievement between subjects, year groups or phases	Significant in school variation in achievement between subjects, year groups or phases
KA4-12 Subject Knowledge expertise	All pupils are being taught by specialist subject teachers in all key stages	The vast majority of pupils are taught by specialist subject teachers and all in KS4 and 5	Most pupils are taught by specialist subject teachers in KS3 and all in KS4 and 5	A significant number of KS3 classes are being taught by non-specialists. All KS4 and 5 classes are taught by subject specialists	The school is dependent on non-specialists teaching classes across the Key stages.
KA4-13 Teacher Knowledge and expertise	EYFS, KS1 and KS2: All classes are being taught by teachers with appropriate phase knowledge and expertise KS3,4 and 5: All classes are being taught by specialist subject teachers	EYFS, KS1 and KS2: The vast majority of classes are being taught by teachers with appropriate phase knowledge and expertise KS3,4 and 5: The vast majority of classes are being taught by specialist subject teachers	EYFS, KS1 and KS2: Most classes are being taught by teachers with appropriate phase knowledge and expertise KS3,4 and 5: Most classes are being taught by specialist subject teachers	EYFS, KS1 and KS2: Many classes are being taught by teachers with limited phase knowledge and expertise A significant number of KS3 classes are being taught by non-specialists. All KS4 and 5 classes are taught by subject specialists	EYFS, KS1 and KS2: All pupils are being taught by teachers with appropriate phase knowledge and expertise The school is dependent on non-specialists teaching classes across the Key stages.

KA5 - Behaviour and Climate for Learning

	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
KA5-1 Climate for learning	The school is truly inclusive. As a consequence, all pupils feel safe, included and accepted. Pupils have an excellent rapport with their teachers, and peers, which promotes progress and success. An aspirational ethos and a culture of very high expectations re attitude to learning, conduct and attendance. pervade the school and there is a shared understanding of acceptable behaviour and consequences amongst all stakeholders. Motivation to learn is high across the school and this impacts positively on academic performance	The vast majority of pupils feel safe, included and accepted. Pupils have a good rapport with their teachers, and peers, which promotes progress and success. An ethos and a culture of high expectations re attitude to learning, conduct and attendance is evident throughout the school and there is a shared understanding of acceptable behaviour and consequences amongst most stakeholders. Motivation to learn is generally high across the school and this impacts positively on academic performance	The school can evidence that pupils generally feel safe, included and accepted and on the whole pupils have a positive rapport with their teachers. There are high expectations and aspirations re pupil attendance and conduct and in most areas of the school attitudes to learning are positive. There is a shared understanding of acceptable behaviour and consequences. Most pupils are motivated to learn	Although most pupils feel safe, included and accepted and the school can evidence some impact of their work around inclusion, a culture of high expectations and aspirations is not yet embedded. Pupil demonstrate positive attitudes to their learning in some areas but a shared understanding of acceptable behaviour and consequences is not always evident throughout the school	Evidence suggests that a concerning number of pupils at the school do not feel safe, included or accepted. Relationships between pupils and staff are often strained and not conducive to learning. There is a culture of low expectations and pupils generally are not motivated to achieve
KA5-2 Behaviour management	Behaviour management is regarded as an integral part of school improvement. An effective behaviour policy which promotes good behaviour, self-discipline and respect is well established. Teachers manage behaviour issues very well, always applying sanctions consistently and fairly in line with the school policy. The school has a highly effective incentive and reward scheme embedded across the school, a supportive and celebratory culture and a high degree consistency in approaches and responses, regardless of the member of staff involved. Well established whole	Behaviour management is given high priority. An effective behaviour policy which promotes good behaviour, self-discipline and respect is in place. Teachers manage behaviour issues well, usually applying sanctions consistently and fairly in line with the school policy. The school has an effective incentive and reward scheme, and a strong culture of support for pupils. There is a good level of consistency in approach and response, regardless of the member of staff involved. Whole school	An effective behaviour policy which promotes good behaviour, self discipline and respect is in place. Teachers generally manage behaviour issues well, applying sanctions in line with the school policy. The school has an incentive and reward scheme in place and staff generally apply this consistently. Whole school and class routines support good behaviour together with teacher pupil relationships built on mutual respect and a developing understanding of individual needs.	An effective behaviour policy which promotes good behaviour, self discipline and respect has been implemented and behaviour management is a key priority within the school. Staff are beginning to apply sanctions in line with the school policy. The school has a reward scheme in place but it is not always applied consistently. Whole school routines are in place to support with behaviour as are classroom routines in some areas. Some teacher pupil relationships are strong but there is still a significant degree of variability.	Although the school may have a behaviour policy in place it is generally ineffective as a result of inconsistency of application and approach and a lack of routines to support learning. Staff need to understand the importance of developing positive relationships with pupils and work with pupils towards establishing a culture of mutual respect.

	school and classroom routines support good behaviour together with teacher pupil relationships built on mutual respect and a deep understanding of individual needs	and classroom routines support good behaviour together with teacher pupil relationships built on mutual respect and an understanding of individual needs.			
KA5-3 Parental support	Parents are nearly always supportive of the school's behaviour policy and management of behaviour incidents. The school has built personalised and meaningful relationships with parents based on positive communication and a shared understanding of expectations. There are hardly any parental complaints concerned with behaviour.	Parents are usually supportive of the school's behaviour policy and management of behaviour incidents. The school has built good relationships with parents based on positive communication and a shared understanding of expectations. Parental complaints are infrequent and easily resolved.	Parents are generally supportive of the school in terms of the behaviour policy and their handling of behaviour incidents. Relationships with parents are usually positive with any complaints quickly resolved.	Although most parents support the school with the implementation of the behaviour policy and handling of behaviour incidents although parental complaints are frequent.	The school needs to improve its communication with parents to build relationships and secure their support in key areas such as behaviour. Parental complaints are frequent.
KA5-4 Attendance and punctuality	Overall absence and persistent absence figures are below the national average for all pupils and disadvantaged pupils. Pupils are consistently punctual arriving at school and arriving to lessons.	Overall absence and persistent absence figures are below the national average for all pupils and in line with national average for disadvantaged pupils. Pupils are usually punctual arriving at school and arriving to lessons	Overall absence and persistent absence figures are in line with the national average for all pupils and disadvantaged pupils. Minor issues with punctuality which the school is actively seeing to resolve.	Overall absence and persistent absence figures are in line with national average for all pupils but above for disadvantaged pupils Or There are issues with punctuality.	Overall absence and persistent absences are above the national average for all pupils including disadvantaged pupils. Punctuality is a major cause for concern.
KA5-5 Low level disruption	Disruption in lessons is very rare. In School data shows that pupils respond well to sanctions. Bullying of any description is very rare and where it does happen it is always dealt with effectively.	There is minimal low-level disruption in lessons and school data shows that the vast majority of pupils respond well to sanctions. Bullying of any description is relatively rare.	Any low-level disruption in lessons is dealt with swiftly and effectively and school data shows that most pupils respond well to sanctions. Any incidents of bullying are dealt with effectively.	In some areas of the school it is not uncommon to find frequent low-level disruption in lessons.	Disruption to lessons is frequent and there are a disturbing number of bullying incidents reported.
KA5-6 Exclusions	Scrutiny and interrogation of permanent and fixed term exclusion data does not give rise to any cause for concern. AND There were no independent appeals panel that overturned an exclusion.	Scrutiny and interrogation of permanent and fixed term exclusion data does not give rise to any major cause for concern. AND There were no independent appeals panel that overturned an exclusion.	Scrutiny and interrogation of permanent and fixed term exclusion data may raise a few questions, but the school is able to provide a satisfactory response. AND There were no independent appeals panel that overturned an exclusion.	Following scrutiny and interrogation of the data, the number of permanent and/or fixed term exclusions is quite concerning. AND/OR An independent appeal panel overturned an exclusion.	Following scrutiny and interrogation of the data, the number of permanent and/or fixed term exclusions is a significant concern. AND/OR An independent appeal panel overturned more than one exclusion.

Summary of Evaluation

External Categorisation	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Outcomes *	EYFS : Phonics and EYFS Profile are LEADING and have been over time	EYFS: Phonics and EYFS Profile are at least SECURE	EYFS: Phonics and EYFS Profile are at least EMBEDDING	EYFS: Both Phonics and EYFS Profile are CONCERNING	EYFS: Phonics and / or EYFS are CRITICAL
	KS1: All KS1 outcomes are at least secure for all prior attainment groups as well as disadvantaged pupils and has been over the last three years	KS1: All KS1 outcomes are at least embedding for all prior attainment groups as well as disadvantaged pupils and has been over the last three years	KS1: All KS1 outcomes are at least EMBEDDING for all prior attainment groups as well as disadvantaged pupils	KS1: All KS1 outcomes are CONCERNING for all prior attainment groups as well as disadvantaged pupils	KS1: Outcomes in some areas or for disadvantaged pupils is CRITICAL
	KS2: Progress in Reading Writing and Maths has been at least above average for the last 3 years and well above in some areas And Disadvantaged pupils are LEADING in most subjects	KS2: Progress in Reading Writing and Maths has been average for the last 3 years and above average in some areas. And Disadvantaged pupils are at least SECURE in most subjects	KS2: Progress in Reading Writing and Maths has been average for the last 3 years And Disadvantaged pupils are at least EMBEDDING in most subjects	KS2: Progress in either Reading Writing or Maths remains below average but with a 3 year trend of improvement And Disadvantaged pupils are CONCERNING in most subjects	KS2: Progress in Reading Writing and Maths remains below average with no trend of improvement And Disadvantaged pupils are CRITICAL in more than one subject
	At least 2 out of 3 of the statements below apply: KS4: P8 Consistently above average or better for the last 3 years. All focus groups at least SECURE KS5 is at least secure for the last 3 years	At least 2 out of 3 of the statements below apply: KS4 - P8 has been average or better for the last 3 years and is above LA average Most focus groups are at least SECURE KS5 is at least SECURE	At least 2 out of 3 of the statements below apply: KS4: P8 has been average or better for the last 3 years Most focus groups at least EMBEDDING KS5 is at least EMBEDDING	At least 2 out of 3 of the statements below apply: KS4: P8 remains below average but with a 3 year trend of improvement All focus groups are CONCERNING KS5 is CONCERNING	KS4: P8 remains below or well below average with no trend of improvement The progress of focus groups is CRITICAL KS5 is CRITICAL

Leadership and Management	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Self Evaluation	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Compliance and Governance	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Curriculum and Wider Educational Offer	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Quality of Teaching, Learning and Assessment	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Behaviour and climate for learning	LEADING	SECURE	EMBEDDING	CONCERNING	CRITICAL
Overall Categorisation	LEADING*	SECURE	EMBEDDING	CONCERNING	CRITICAL

* for a school to be categorised as LEADING overall, safeguarding and compliance must be effective and progress must be at least secure. Where outcomes are concerning or critical the overall evaluation cannot be secure or leading.