



HALES VALLEY TRUST

NEW SCHOOL INDUCTION PACK

November 2018

V3

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INDUCTION PACK FOR NEW SCHOOL JOINING HALES VALLEY MULTI ACADEMY TRUST

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In this induction guide you will find a combination of information in hard copy along with directions on how to find additional website information.

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1. **WELCOME TO HALES VALLEY MULTI ACADEMY TRUST: Success for all**

Our Trust aims for *all* schools in our partnership to be good or better. We want to ensure that no child, no teacher and no school gets left behind. We feel that as an Academy Trust we are able to work more creatively to best serve the needs of our children and our communities. We are able to use our staff in a more flexible and responsive manner – we share our expertise and grow our own teachers and leaders. We ensure that our staff have opportunities to grow within and across our Trust, ensuring that we retain our high levels of expertise and ensuring that our succession planning is secure.

The communities that we serve across the trust encompass stakeholders from both affluent and disadvantaged families, drawn from a wide variety of ethnicities and religious backgrounds. Our ethos is one of inclusivity, promoting an equality of opportunity for every child across the Trust.

We maximise the freedoms afforded to us by academisation through reinvesting any financial surplus to create additional benefits and opportunities for our children, developing leadership capacity and specific expertise, staff retention, new ideas for schemes of work, challenge to within-school variation, having a more systematic and cost effective sharing of professional development, sharing of resources to improve financial efficiencies and creating strength through alliance.

Teaching and Learning

Our approach to teaching and learning is to apply a consistency of pedagogy across the trust which ensures that all pupils achieve, feel secure enough to take risks and make mistakes, have high aspirations for learning and for the next phase of their education, have high self-expectations, promote independence, resilience, respect, tolerance, an open-minded world view, are happy and confident, develop independent and collaborative learning skills, have pride in our Trust and community and know how they can successfully contribute to this.

Approach to improving schools in categories

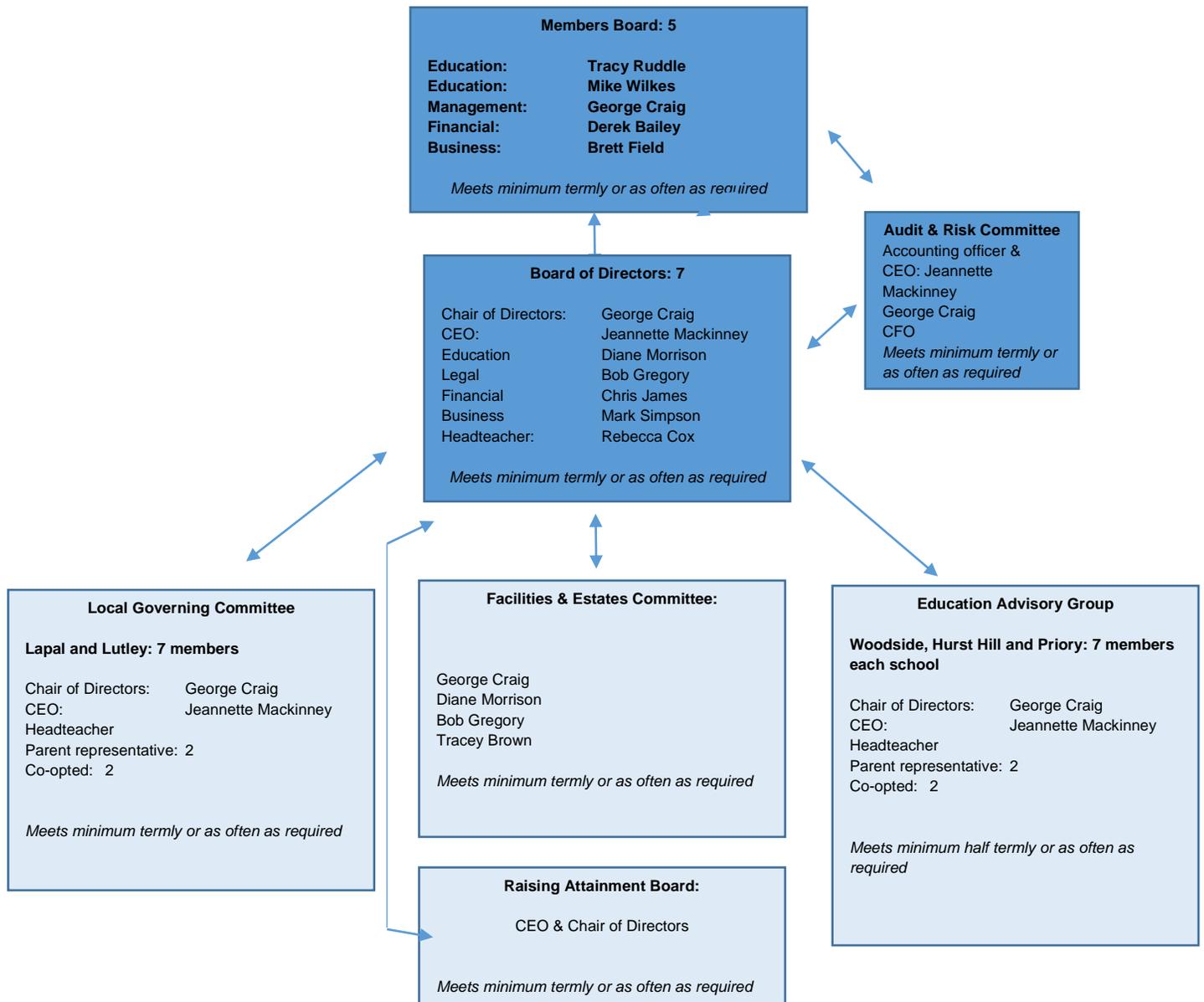
A school that is in a category of special measures or requires improvement can expect the following support:

- As a priority an audit of leadership and management and an audit of teaching, learning and assessment will be carried out to identify needs and specific support that will be rapidly put into place via a school improvement action plan. This plan will be evaluated every half term by the CEO and Chair of Directors and amendments and further support and challenge put into place as necessary.
- If necessary staff from across the Trust will be put into place to add leadership capacity
- The school will benefit from weekly support from the CEO as the school improvement adviser and weekly support from the Chair of Directors as the lead for the Education Advisory Group

Throughout the year all schools will also benefit from:

- CEO, LLE, SLE and SLT support from the Teaching Hub and from across the Trust
- Access to a full programme of CPD support for teachers, teaching assistants and admin teams
- Financial planning and budgeting support via the CEO and Finance Director
- Buildings and site development and improvement via the Operations Director
- HR support
- Access to the NQT induction programme and the RQT (recently qualified teachers) CPD programme
- Access to moderations programmes: EYFS, Y4, Y2 and Y6
- A suite of Trust central policies
- Safeguarding and compliance audits/ongoing support with any identified actions
- Health & Safety review
- Peer to peer reviews
- Pupil premium reviews
- Consistent appraisal

2. TRUST STRUCTURE



Accountability:

The **Members Board** will assume overall responsibility for the Trust. A board member will also sit on the Board of Directors.

The **Board of Directors** will be responsible for strategic direction and the smooth running of the Trust. They will be responsible for outcomes of all schools across the Trust. The Board will be chaired by the Chair of Directors.

Good and Outstanding schools will have a **Local Governing Committee** with responsibilities delegated to them by the Board of Directors. Schools in categories will have an **Education Advisory Group** set up, which may include some existing governors. This group will evolve into a local governing committee within 12 months.

The **Education Advisory Group** will be chaired by the Chair of Directors and attended by the CEO. This will ensure rigour and accountability for every school in the Trust. Good and Outstanding schools will meet termly and Schools in categories will meet at least half termly. The CEO also sits on the Board of Directors, ensuring a flow of information between the RAB and the LGCs/EAGs.

SIP – school improvement partner

HVTS: Hales Valley Teaching School

CEO – Chief Executive Officer

LGC – Local Governing Body

EAG – Education Advisory Group

Schools currently in the Hales Valley Trust:

- Lutley Primary School Halesowen
- Lapal Primary School Halesowen
- Woodside Primary School Central Dudley
- Hurst Hill Primary Coseley
- Priory Primary School Central Dudley

Key Personnel

Chairs of Directors: George Craig

George has an established track record of improving school governance through system leadership. He became a National Leader of Governance in 2013 during the early phase of the programme and was appointed as National Leader of Governance Advocate for the West Midlands in January 2015. In September 2018, he was appointed as West Midlands Stronger Governance Champion with responsibility for improving school governance across the region. George is an experienced ERG reviewer, IEB Chair, and also works in a professional capacity as an Education Consultant, providing a wide range of support and training for the DfE, local authorities, and schools locally and nationally.

Chief Executive Officer: Jeannette Mackinney

Jeannette has been a Headteacher in Dudley for 16 years. Through Hales Valley Teaching School, and in her role as National Leader of Education, Jeannette has supported many schools to help develop leadership and raise standards. The impact of this work can be clearly seen as schools that she and the teaching school have supported have moved from Ofsted categories.

Jeannette's leadership has been judged as outstanding in the three inspections she has had in the role of Headteacher. Jeannette is also a current Ofsted Inspector.

Central Team:

Operations Director: Tracey Brown

Tracey has been a School Business Manager and Federation Business Manager for 9 years. She became a NCTL Business Advocate and supported schools across the West Midlands within administration, back office functions and Business Management after completing the School Business Director Programme. Tracey was one of the founder members of the Dudley School Business Managers Association in 2009, a group that was formed to offer mutual support and networking opportunities to those employed in a School Business Management role within the Dudley Borough.

Finance Director: Vicky Glazzard & Carly Beale

Vicky is a qualified accountant and has over 25 years of accountancy experience in both public and private sector. She trained in private sector and built her experience in varied roles. Over the last 12 years Vicky has worked in public sector. Most of this time she spent in Children's Services providing schools with the financial information they need to enable them to run efficiently and effectively.

Vicky is a non-executive director for Windsor Multi Academy Trust (MAT) which enables her to see the requirements of an MAT from both angles. She has also completed a secondment at HM Treasury working in the Whole of Government Accounts which consolidates the audited accounts of public sector bodies.

Carly is professionally qualified with over 13 years experience of providing accountancy support to both the private and public sector. She has worked in a number of varied roles which include advising schools and childcare providers on efficient spending and value for money.

Most recently Carly has supported schools in the conversion to academy status, ensuring a seamless transition from Local Authority control. Her technical ability along with her outstanding personal qualities enables her to support her clients in achieving their goals.

Executive Assistant: Rachel Dean

Rachel has worked as a Finance Manager for over 13 years within the Banking Industry. She joined Woodside Primary School as a Finance Assistant and supported the school with Office Management, Finance and Administration and worked closely with the School Business manager to ensure the school operated effectively. Rachel has recently been appointed to the Executive Team to provide operational and financial support for Hales Valley Trust.

Accounting Officer:	Jeannette Mackinney
Chief Finance Officer:	Vicky Glazzard
Headteacher Lutley:	Rebecca Cox
Headteacher Lapal:	Joanna Turner
Headteacher Woodside:	Sally Bloomer
Headteacher Hurst Hill:	Rebecca Keen
Headteacher Priory:	Jill Craig

3. GOVERNANCE

As a charity and company limited by guarantee, the Trust is governed by a board of trustees (the Board) who have overall responsibility and ultimate decision making authority for all the work of the Trust, including the establishing and running of the academies maintained by the Trust (the Academies and each an Academy).

In order to support the effective operation of the Trust and the Academies, the Board has established a number of committees to which it has delegated certain of its powers and functions. These terms of reference (Terms of Reference) set out the constitution, membership and proceedings of the committees the Board has established.

In summary, the Board has established two different types of committee:

- Main Board committees which are established to deal with Trust-wide matters such as Facilities and Estates (Board Committees); and
- Local governing committee (LGCs) and education advisory groups (EAGs) which are established by the Board to support the effective operation of the Academies

Directors and Governors generally spend approximately 6-8 hours per month on their role. Much of the day to day work of the Board of Directors is carried out by specially tasked committees. Board meetings are held in term time only and are usually held during the evening. LGC/EAG meetings are also held termly, during the school day.

The Terms of Reference for each committee contain details of the functional responsibilities delegated to them by the Full Governing Body and can be found within the Key Documents section.

The desired outcomes for each committee are to:

- Enable the governors to deliver their responsibilities in the most efficient, effective and innovative way possible
- Ensure there is a good level of information and knowledge sharing between governors
- Create a committed and inclusive team
- Allow us collectively to understand what each governor is doing to help facilitate the delivery of our vision.

4. KEY PERFORMANCE INDICATORS

Our vision: Success for All

Our mission: Working together to improve outcomes for all our pupils.

Our culture is driven by our shared values and our 6 core principles:

- **Trust**
- **Success**
- **Engagement**
- **Opportunity**
- **Well-being**
- **Global citizenship**

Our aims:

1. All our schools are good or better
2. Attainment and/or progress is *at least* in line with national figures
3. Attendance is *at least* in line with national figures
4. All schools are led by effective senior leaders, supported by well-trained, motivated staff, underpinned by the Trust CPD guarantee
5. There are opportunities for key staff to work across the Trust schools to support school improvement
6. All schools are well supported by strong governance at school and Trust Board level
7. Pupils have opportunities to work together across the Trust
8. The Trust remains financially stable

We have key performance indicators that are specific to each academic year, based on outcomes for the previous year and our journey towards achieving our aims.

5. SCHOOL IMPROVEMENT

The Trust will work together to ensure that all our schools are good or better.

A school that is in special measures or requires improvement can expect the following support:

- As a priority an audit of leadership and management and an audit of teaching, learning and assessment will be carried out to identify needs and specific support that will be rapidly put into place via a school improvement action plan. This plan will be evaluated every half term by the EAG and amendments and further support and challenge put into place as necessary.
- If necessary staff from across the Trust will be put into place to add leadership capacity
- The school will then benefit from weekly support from the CEO as the school improvement adviser and weekly support from the Chair of Directors as the lead for the Education Advisory Group
- Throughout the year schools will benefit from:
 - CEO, LLE, SLE and SLT support from the Teaching Hub and from across the Trust
 - Access to a full programme of CPD support for teachers, teaching assistants and admin teams
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 - Access to moderations programmes: EYFS, Y2, Y4 and Y6
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 - Peer to peer reviews and Pupil premium reviews
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The Trust sets out a calendar for training and school improvement each academic year:

- All good and outstanding schools receive a SIP visit from the CEO termly, with an agreed agenda. Outcomes of these visits will be shared with the Board of Directors.
- All special measures or requires improvement schools receive half termly school improvement visits via the EAG meetings with the CEO and the Chair of Directors.
- Appraisal policy and procedures are consistent and all schools will use the FILIO system to record appraisal objectives for teachers and support staff.
- Lead staff in each school will be expected to work with staff in the other schools to develop consistent policy and procedures across the MAT - e.g. SEND policy, Child Protection, Assessment, Attendance
- Key staff meetings and INSET days are identified for MAT collaboration and development.
- Common areas for training and development are identified for the academic year.
- There is an NQT programme in place for all NQTs across the MAT, led by senior leaders from

across the Trust and supported by key staff from all schools.

- There will be an RQT programme in place for all RQTs across the MAT, led by senior leaders from across the Trust and supported with key staff by all schools.
- There is a moderation programme in place for key year groups across the MAT, led by the CEO and supported by SLT and key staff from all schools. This will take place every half term for EYFS, KS1 and KS2 and, in the future, every term for Y1, Y3, Y4 and Y5.
- There is a common policy and procedure for assessment across the MAT. The system that we use is SPTO. Assessment information is collected every half term and progress evaluated and shared.
- Each Headteacher will participate in annual peer to peer reviews with their Headteacher colleagues.
- There will be an annual safeguarding audit, website/policy compliance review and governance review carried out by the Chair of the Directors.
- There will be a pupil premium review.

6. FINANCE

- We use PS Financials as our main financial operating system and we bank with Lloyd's Bank.
- The Accounting Officer is Jeannette Mackinney and the Chief Finance Officer is Vicky Glazzard.
- Each school manages its own day-to-day financial transactions and budget, reporting to the Trust.
- Each school has monthly budget monitoring meetings with the Finance Director and Operations Director.
- The annual budget runs from September to August.
- The CEO and Finance Director sets the budget in partnership with the Headteacher. This is presented to the Board of Directors for approval.
- Each school pays a percentage into the central trust budget as follows:

• Good/outstanding schools	5%
• Requires improvement/special measures schools	7%
- This is to pay for central services already identified.
- This will be reviewed annually.

7. KEY DOCUMENTS

It is important that you make yourself familiar with the following documents to provide you with some helpful background information for the Trust:

Key trust policies:

- Financial Procedures
- Academies Financial Handbook
- Articles of Association
- Governance scheme of delegation and terms of reference
- Governor handbook
- Minutes of Board meetings and committee meetings
- Trust Development Plan
- Trust KPIs
- Trust Strategic Plan
- Safeguarding & Child protection policy
- SEND policy
- Admissions policy
- Attendance policy
- Complaints policy

9. TRUST EXPANSION

Who can apply to join our Trust?

- Any school that shares our vision
- Any school that wants to have greater autonomy whilst also benefitting from membership of a strong and secure group of academies who support each other for the common good of their children
- Any school that wants to be part of a family of schools whereby actively shared best practice and continuing professional development helps all of our staff, pupils and governors to flourish

Trustees will give preference to applications from primary schools:

- With more than 400 pupils on roll
- That do not have significant structural deficits
- Whose estates and buildings do not present significant financial risk
- No more than 30 minutes drive from an existing Hales Valley Academy

However, the Board of Directors will consider applications from schools that do not meet one or more of the above criteria if there are mitigating factors.

Directors may also consider applications from multiple schools, where one or a minority do not meet all of the criteria above, where there could be the beginning of a new Hales Valley cluster.

Academy recruitment / joining criteria

- Sponsored academies will be accepted on the recommendation/approval of the RSC and after due diligence by the Trust Board of Directors which will make its recommendation to the Board.
- No more than one secondary or two primary schools will normally be sponsored in any single academic year. More can be considered by exception.
- All academies will need to have the formal approval of the RSC before they can join the Trust.
- The Board will approve all new academies.
- All schools/academies will need to prove that they are financially viable or that the leadership/structural model adopted on entry is financially viable
- All converter academies/existing single trust academies (i.e. those deemed good or better by Ofsted) will be required to demonstrate what and how they will be able to contribute to the growth and development of the Trust.
- The Trust will need to be satisfied that all academies will fully engage with, and be fully committed to its vision, values, goals and tight principles and practice.

DO YOU KNOW A SCHOOL WHO MAY BE INTERESTED IN BECOMING PART OF HALES VALLEY TRUST?

For more information about joining our family of schools, feel free to get touch with us on:

01384 816778

Or email us at:

info@halesvalleytrust.org.uk



HALES VALLEY TRUST