

the Orchard Learning Alliance



Tom Bartlett
November 2022

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Message from the Chair of Trustees – Michael Marsden



Firstly, I would like to thank you for your time, courage and co-operation since the opportunity to collectively form a new Multi Academy Trust was first proposed in November 2021. Whilst much has changed nationally and internationally since, Government policy on the future of schools within Multi Academy Trusts has not. This is a unique opportunity to secure the future of our schools within our community.

Over the last 8 months Headteachers and Governors from our schools worked closely to co-design and co-construct a Multi Academy Trust that reflects our common values, and will strengthen and secure the future of our much-loved schools within their communities.

A tremendous amount has been achieved. Working collaboratively and building up on the relationships and trust established through the Schools Learning Alliance, our school leaders have set out a clear vision, ethos and values: our North star against which all future decisions will be measured. Additionally, they have selected a new name for the Trust: Orchard Learning Alliance. This perfectly reflects a key aim of the Trust to be a place that seeds, cultivates and nurtures our staff and pupils to reach their full potential.

Supported by external consultants, they agreed an Operating Model for the Trust around shared services which creates efficiencies and enables Headteachers to focus on delivering their core function to provide excellent teaching and learning.

As a Trust our aim is to set a vision, agree ambitious goals, assemble a strong team, enable, support and empower teachers, support pupils and staff within our schools to thrive.

I am incredibly excited about what our senior leadership teams have achieved in this short period, and even more so about what we can achieve together in the future, to build on these strong foundations, enhance our schools and improve the life chances of all the children within our community.

Message from the CEO – Tom Bartlett



Almost exactly a year ago, on November 11th 2021, we first came together, to discuss the future of the Schools Learning Alliance, and the proposal was made that those schools that chose to do so, could come together to co-design and co-construct a new Multi Academy Trust, using Waingels' constitution as a Multi Academy Trust as a vessel. A year on, this document presents the results so far of the co-design and co-construction process that we – the Headteachers and Governors of 10 schools and the Trustees - embarked upon.

The scale of our ambition and this project, whilst not unprecedented, is significant. Most Multi Academy Trusts grow slowly with the gradual addition over time of more academies. I say it is not unprecedented, but I have yet to hear of any other Trust that has grown in the same way and scale as we are proposing.

I worked for the first 17 years of my career in Botswana in Southern Africa, where I worked in education as a teacher, headteacher and teacher trainer. One of Botswana's founding values is *Boipelego*, indeed, the first school I was posted to was named *Boipelego*. It means self-reliance. It was a school founded by a community for its children. There is no road map or template for setting up a Multi Academy Trust, especially one on this scale. Of course, we have drawn on sector expertise and experience wherever possible, and this has been immensely useful in learning about the pitfalls that have beset others and how to avoid them. But ultimately, this project is a perfect example of a community coming together and doing things for ourselves – being self-reliant. In leading this project, and working with the Headteachers of all 10 schools and working with Governors and Trustees, what has inspired me is the breadth and depth of talent and the unerring desire to build a strong, values-based Trust – with strong peer led school improvement strategies at its heart - for our community.

From the outset, we were determined that our new Trust would provide a home for the Schools Learning Alliance (SLA). To provide the security and structure for the SLA to thrive and be the central tenet of our school support and challenge work.

The process of co-design and co-construction will not end with the formation of our new Trust: it is and will continue to be, a fundamental essence of our ethos and culture.

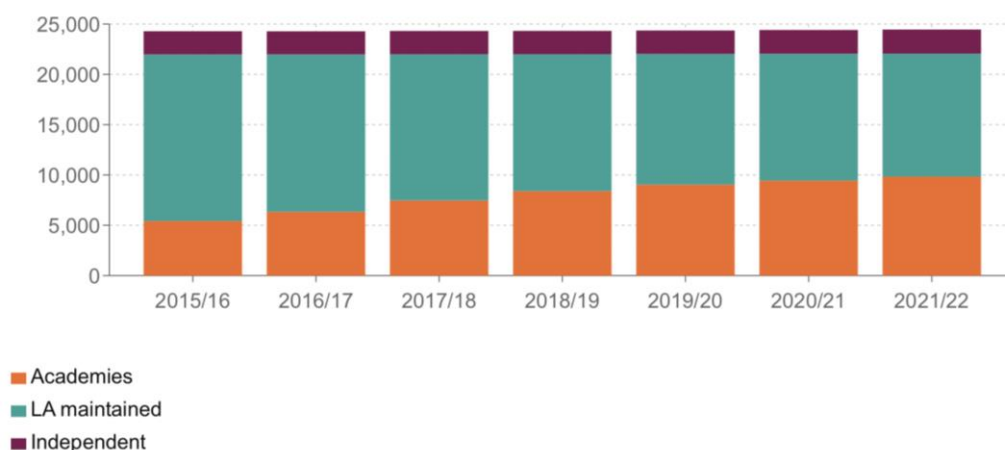
National & Local Picture

Our motivation in coming together to create a new Trust was born partly out of a desire to provide the Schools Learning Alliance (SLA) with greater security and structure. The SLA had evolved, in part, out of a frustration that the local authority was not able to provide the school improvement service that schools wanted. There was also a realisation, that Brexit had delayed the Government's drive to full academisation, and there was a strong sense across all schools involved from the outset, that we would all prefer to be part of a Trust that we helped to create, one that was rooted in our community, that we would be stronger together and that there was a moment that needed to be seized, and we did not want to risk waiting until our choices were diminished.

The White Paper, published in March 2022, 6 months after we began our collaboration, cemented the Government's ambition, that all schools in England will become Academies and part of a family of schools in a Multi Academy Trust by the end of this decade.

This was the position nationally in 2021-22

Number of schools by type of school (Academy/Local Authority maintained/Independent), 2015/16 to 2021/22



Source: [DfE 2022](#)

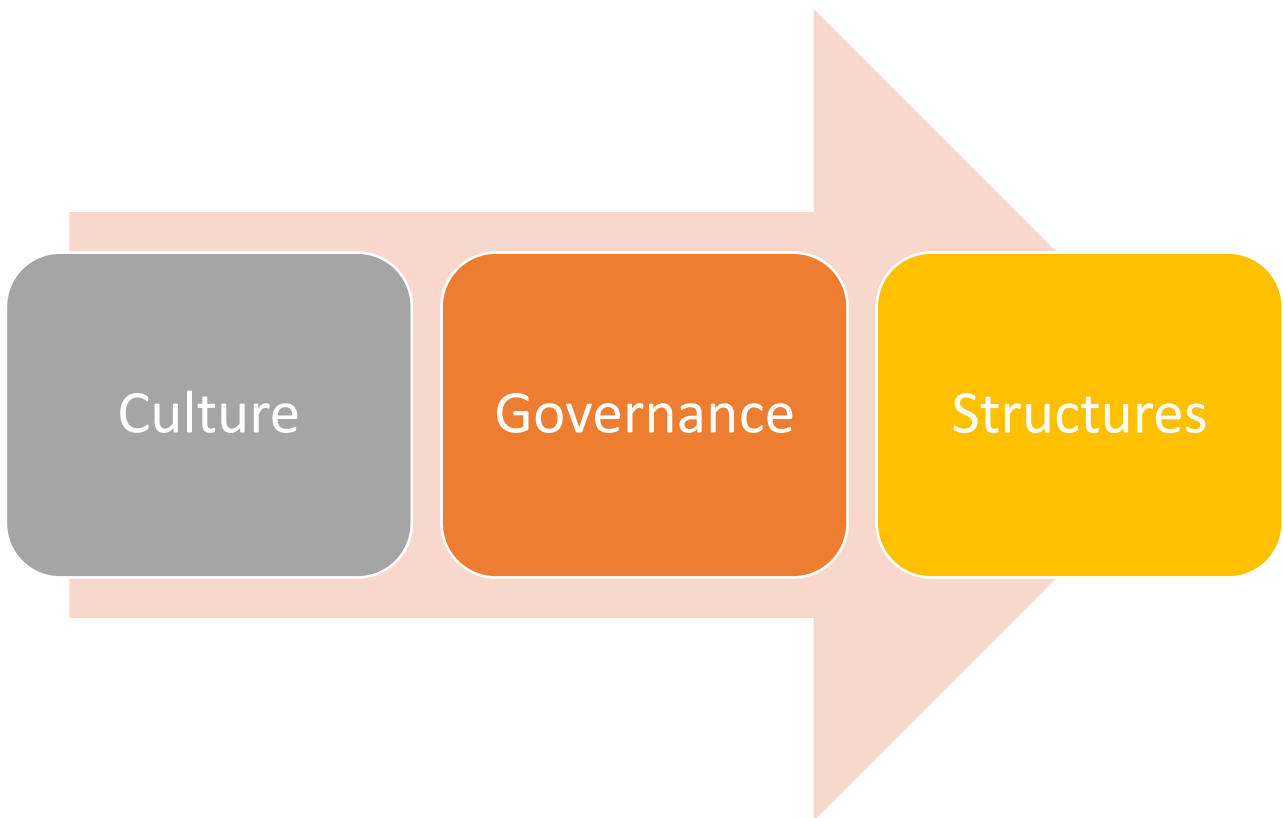
In Wokingham, all secondary schools are now Academies (or in the process of becoming one). Including the Orchard Learning Alliance, there are three Trusts which contain predominately Wokingham Schools – The Keys (all Church of England Primary Schools) and The Circle Trust. At a recent meeting of the Borough Education Partnership, attended by a representative of the Regional Director of Education, it was noted that over 50% of Wokingham Primary Schools are now academies (or in the process of becoming one) and the borough is well on its way to full academisation. Noting the growth plans of the Orchard Learning Alliance, the Regional Director's representative commented that all the indications are that the Trusts currently operating in Wokingham (including the OLA) have the capacity to expand over time and meet all the borough's needs.

Would a change of Government alter the move towards a fully academised education system in England? It is very difficult to say with an election likely to still be two years or so away and without the full publication of party manifestos. Most commentators note that the current system is still fragmented and with the acceleration of the process driven by the White Paper, it is highly unlikely that any new government would attempt to reverse the trend that has gained so much momentum. A very recent (October 2022) Labour Party policy paper, written by David Blunkett, the former Education Secretary and initiator of the academy system, suggests there will be no change to this policy under a Labour Government.

Getting Started

From the outset, Waingels took a lead and has financed the co-design and co-construction of our new MAT. A new Head of School was appointed to run the day-to-day operations at Waingels, allowing me to focus all my time, energy, and resources on building the new Trust. I have worked very closely with the Headteachers of all 10 schools and, in particular, with Gareth O'Shea and Nicci Morris, the co-leaders of the SLA. I also enrolled on a course for Trust Leaders with the Ambition Institute which has been a great source of information and networking.

Our work has followed three strands, the three building blocks or foundations for any new Trust: Culture; Governance; and Structure. For each of these we have engaged with sector expertise and experience to help us ensure we build strong foundations. If you attended any of my presentations to schools between December 2021 and May 2022, this graphic will be familiar:



Culture

We had to be certain that across the 10 schools, there was a good fit in terms of ethos and values, in order to build a family of schools. There was a strong sense that we shared a lot in common partly through our involvement with the SLA and as we all serve the same communities. We knew each other well and had already built up strong layers of trust through our school improvement collaborations. However, to be certain of this and in order to articulate our common culture, we commissioned Dan Morrow, an experienced Trust leader and Chief Executive Officer of the Dartmoor MAT, to facilitate a Vision Day in May 2022.

Dan met with each Headteacher before the Vision Day to establish what each Headteacher identified as their most important values, what they most wanted to gain through collaboration and what they did not want to lose. Working with Headteachers and Governors on the day, Dan came up with a set of statements for our Mission, Values and Vision. Subsequently, a steering group, refined these statements and they were presented to and approved by Trustees in September 2022.

Our Mission – Why we exist:

To promote excellence and social justice through exceptional schools.

Our Values – What we believe in and how we will behave:

- We cherish the relationship between pupils, staff, parents, carers and governors and we will nurture these relationships for the benefit of all.
- We will make sure that through courageous choices and meaningful collaboration, everyone at the Orchard Learning Alliance thrives.
- People Matter. We value the contribution of individuals, and we will continually invest in their development.

Our Vision – What we want to be

We want to be an Alliance that serves our communities in a way that transforms the life chances for all.

the Orchard Learning Alliance

This steering group was also given the task of choosing a name for our new Trust which proved much easier than initially thought! Careful analysis of the names, logos and values of all schools quickly identified that all had a close connection to nature. The concept of an **Orchard** emerged – a place where young seeds and saplings are planted, fertilised and nurtured, where they grow in a protected and cared-for environment, where their individual needs are catered for, and where they grow into strong, sturdy trees and bear fruit. The analogy perfectly fits with our Ethos and Culture. The rest was even easier. We are the Orchard **Learning Alliance**. **Learning** – because that is what we are about and an **Alliance** because that is what we are – a group of allies who have come together of our own volition, to form our own Multi Academy Trust because we will be stronger together. I am indebted to Matt Hickey, Headteacher at Highwood, who led this steering group.

The Members passed a resolution to change the name of the Trust in July 2022 and the Orchard Learning Alliance was registered with Companies house and came into being on September 1st 2022.

Governance

In January 2022, The Local Authority helped introduce us to the Regional Schools Commissioner (since renamed as the Regional Director of Education). Mike Marsden, Chair of Trustees, and I met with Catherine Turton, a Team Leader in the Regional Director’s office, who oversees all academisation projects in Wokingham. At the time of this first meeting just 4 schools had committed, in principle, to join our new Trust, but we informed her that there were several others who were considering. Catherine noted that our project, though not unprecedented, was highly ambitious. She suggested that growth at the scale we were suggesting would require real strength at all layers of Governance and she commissioned a consultant from the National Governors Association to conduct an External Review of Governance (ERG).

Waingels had been constituted as a MAT since it became an academy in 2015. However, as the MAT only contained one school (Waingels), in many ways the Governance Structures did not make sense and there was considerable over-lapping of roles. The ERG published its report in March 2022 and provided us with a clear action plan. We immediately set out to increase our Governance capacity and recruit new Members and Trustees with the requisite skills.

Articles of Association

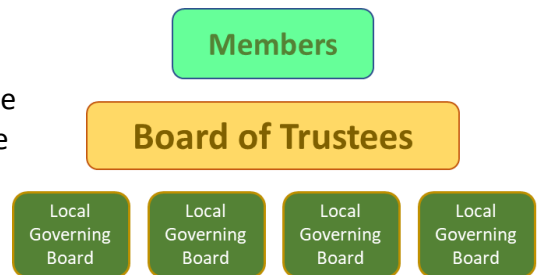
The Orchard Learning Alliance is a charitable trust or company, registered at Companies House and governed by a set of Articles of Association. In July 2022 we adopted the latest Department for Education model Articles of Association which include the following two objects for the Trust:

- a. to advance for the public benefit education in the United Kingdom

- b. to promote for the benefit of the inhabitants of the areas in which the Academies are situated the provision of facilities for recreation

In a Multi Academy Trust, there are three layers of Governance:

The **Members** are the guardians of governance. They are like the shareholders in a company; they appoint Trustees to oversee the operations of the Trust; they agree, and can change, the Trust’s Articles of Association, and they appoint auditors to check the Trust’s accounts. They have an “*eyes on, hands off*” role. We now have four members and are currently considering two recent expressions of interest. For a full list of Members please see Appendix 1.



The **Trust Board** is the decision-making body of the academy trust and is accountable and responsible for all the schools in the Trust. The work of the Trust Board is governed by the Articles of Association and the Nolan principles of public life. It has three **Core Functions**

1. Ensuring clarity of vision, ethos and strategic direction.
2. Holding the Executive Leaders to account for the educational performance of the schools and its pupils and the effective and efficient performance management of staff.
3. Overseeing the financial performance of the schools and making sure that its money is well spent.

Source: [Academy Trust Handbook 2022](#)

Originally, Waingels Academy Trust had four Trustees. We drew on NGA guidance to identify the skills that we needed to add to the Trust Board, but we also took on ideas and suggestions from feedback from

presentations to schools. We set out to recruit additional Trustees to ensure we had people with the following skill-sets on our Board:

- ✓ Auditing
- ✓ Branding & Marketing
- ✓ Change & Growth Management
- ✓ Corporate Governance
- ✓ Digital Strategies & Technology
- ✓ Education: Primary, Secondary, SEN, Early Years
- ✓ Finance
- ✓ Human Resources
- ✓ Legal & Compliance
- ✓ Property & Real Estate (H&S)
- ✓ Risk Management
- ✓ Safeguarding

Our new Trust Board is diverse in terms of age, gender, ethnicity and thought, and fully satisfies the above skills audit. Many of the new Trustees have many years of experience in school Governance – close to 150 years’ (although we recognise there is a difference between the role of Trustees and Governors). Most, but not all of that experience, has been gained in schools which are joining the Trust. But where they still hold a local governance role a succession plan is already in place so that they will become impartial Trustees once their school has joined. For a full list and biographies of the Trust Board, please see Appendix 2.

Local Governing Boards

In a Multi Academy Trust, Local Governing Boards are committees of the Trust Board. The only prerequisite for membership of a Local Governing Board is that each must include two elected parent Governors. All other Governors are appointed by the Trust Board. Currently, the makeup and membership of each Board is very different and it would make sense that we work towards greater alignment in the future. There is a trend in the sector that Local Boards are called advisory boards as their governance role is diminished. However, the OLA Trust Board has, from the outset, recognised that schools want to retain autonomy. We believe that Local Governing Bodies are best placed to exercise this autonomy over their schools, so it has been decided that these local committees continue to be called Local Governing Boards.

Trust Board Committees

The Board of Trustees has decided to create 5 sub-committees (see Organisational Chart):

- ✓ Risk & Audit
- ✓ Finance & Resources
- ✓ People & Pay
- ✓ Quality of Education
- ✓ Inclusion & Social Justice

Each committee will be comprised of between 3 and 5 Trustees. The CEO and other members of the Executive Team will attend committee meetings as required and where relevant. Trustees will seek Governors with relevant expertise and experience from Local Governing Boards to join each committee – this is one way that the co-design and co-construction process will continue once the Trust is formed as it gives Governors a place around the table and a voice where decisions are being made. Trustees may also co-opt external experts to advise these committees.

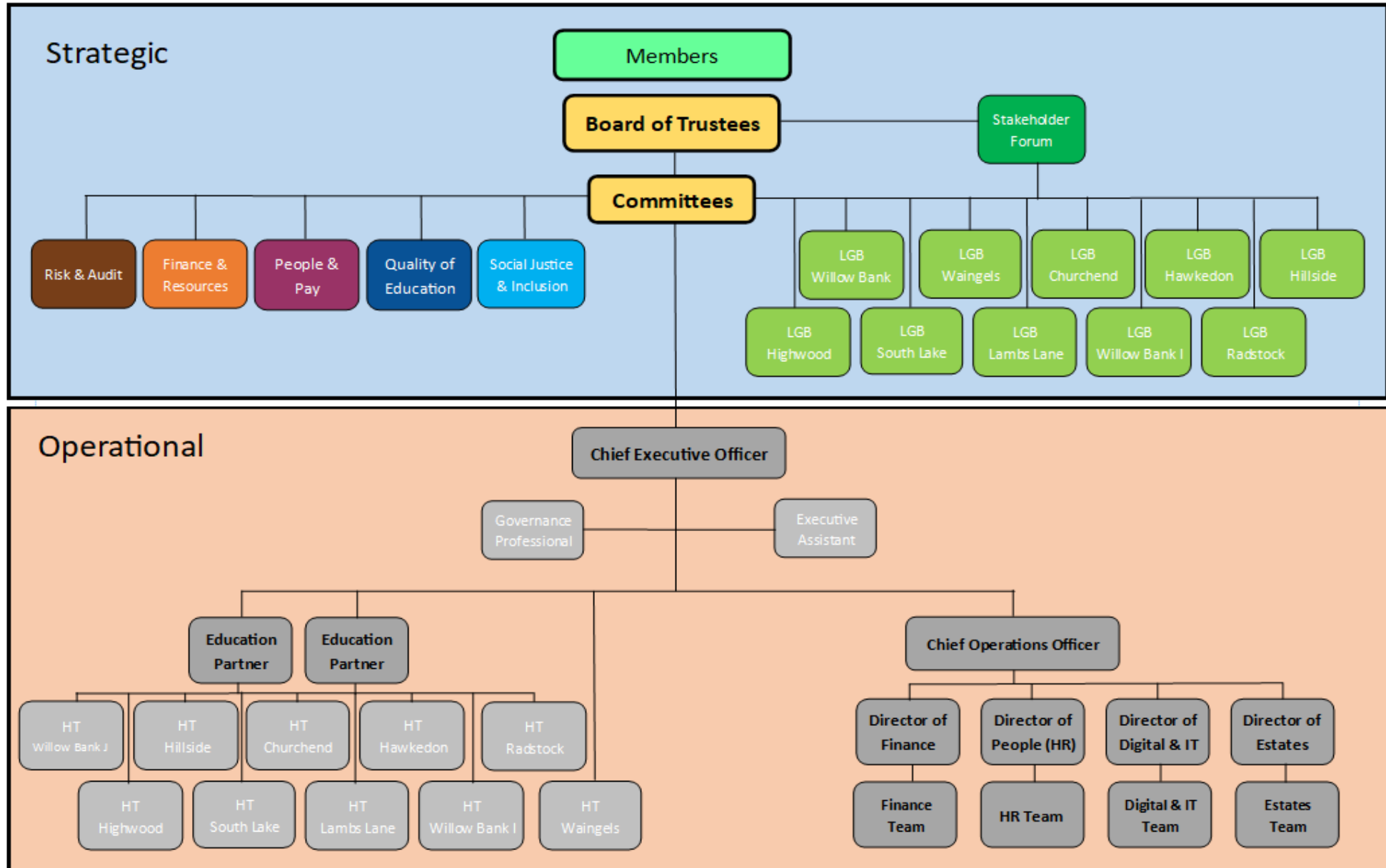
The [Stakeholder Forum](#) will bring together Chairs of each LGB to meet with the Chair of the Trust Board and other Trustees, three times a year. It is through the Stakeholder Forum, that Trustees get the opportunity to assess and evaluate how the strategies and policies the Trust Board has approved impact on the lived experiences on those in schools – pupils, staff and parents. We will devise pupil, staff and parent voice surveys to be conducted across all Trust schools and these surveys will inform the work of the Stakeholder Forum.

Governance Professional

The Governance Professional is like a company secretary. It is a statutory role whose purpose is to ensure the Trust Board works in compliance with legal and regulatory frameworks, understands the potential consequences of non-compliance, offers independent advice on procedural matters and offers clerical and administrative support – e.g. clerking Trust Board meetings. Our Governance Professional is Frances McMillan. Frances took up her post in September 2022 and in addition to her Governance role, also provides administrative support for the CEO.

Source: [Academy Trust Handbook 2022](#)

Orchard Learning Alliance Organisational Structure



Scheme of Delegation

A scheme of Delegation, is our document or manual, which makes it clear where accountability and responsibility for making decisions within our Trust are made.

The Trust Board has begun the work of constructing a detailed Scheme of Delegation and Terms of Reference for each committee. Our analysis of other Trust's Schemes of Delegation show that they vary significantly, especially in the depth and detail they go to, and again, there is no template. The Board has created 3 working parties to focus on different areas of delegation covering the following headings:

- | | |
|-----------------------------|--------------------|
| 1. Vision, Ethos & Strategy | 6. Education |
| 2. School Organisation | 7. Stakeholders |
| 3. Finance | 8. Trust Services |
| 4. Pupils | 9. Risk Management |
| 5. People | |

In the spirit of continuing the co-design and co-construction ethos, two headteachers will join each working party and Trustees would like Governors to join these groups as well.

Trustees are keen to strike the right balance between delegating decision-making authority to Governing Bodies and Headteachers - allowing schools to retain autonomy - while at the same time, delegating some decision-making powers to the Executive Team and Trust Committees. This would mean that Headteachers and Local Governors are relieved of some of the more monotonous and duplicitous duties and are able to concentrate on matters of more importance such as the Curriculum, School Ethos and Values and the appointment of staff.

For example, most policy writing and approval for things such as Health & Safety, Human Resources, Safeguarding, GDPR, Performance Management and Pay will be held centrally by the executive team, resulting in a significant reduction in duplication across schools. On the other hand, the Curriculum will remain the responsibility of the Headteacher and Local Governing Board.

Trustees are also fully aware of where accountability lies. Within any Multi Academy Trust it lies squarely on the Trustees. Therefore, through the scheme of delegation and through the various committees, it is essential that the Trust Board has a clear line of sight from the Board Room to the Classroom and that it has systems in place to assess and evaluate the impact of strategies on the lived experiences of pupils, staff and parents in schools.

To give you a flavour of what our scheme of delegation might look like, here is a skeletal plan with some of the key areas and some examples of how responsibility and accountability will be delegated.

Sample Scheme of Delegation

Responsible: who gets it done;

Approver: who checks & agrees;

Supports: helps to action;

Consulted: contributes their opinions;

Informed: is told.

Category	Task/Decision	Head teacher	Local Governing Board	Chief Executive & Executive Team	Trust Committees*	Trust Board	Members
Vision, Ethos & Strategy	Trust Ethos & Values	C	C	C/R	C	R	I
	School Vision, ethos & values	R	R/A	C/A	-	I	-
	School annual development plan	R	R/A	C/A	A (QoE)	C	-
Finance	Appointment of External Auditors	I	I	C	C/A (R&A)	C/A	R
	Setting annual trust budget including top slice & service fee	I	I	C	C/A (F)	R	-
	Setting School Budget	R	C/A	S/C	C/A (F)	-	-
People	Initial appointment pay decisions teachers	R	I	C/A	-	-	-
	Staff restructuring, redundancy & reduction	R	S	R/C/S	C (P&P)	A	-
	Appointment of Headteacher		R	R/C/S	C (P&P)		
Education	Setting the School Curriculum	R	C/A	S	A (QoE)	-	-
	SEND strategy & provision	R	R	R	C/A (QoE)	A	-
	Safeguarding: oversight, policies & procedures	R	R	R	C/A (I&SJ)	A/R	-
School Organisation	In year Admissions	R	S	C/A			
	Setting school term dates, holidays, and times of sessions	R	C/A	C/A	I	I	-
	Closure of school due to extreme circumstances eg weather	R	I	A	-	I	-

Committees: Risk & Audit: (R&A); Finance: (F); People & Pay (P&P); Quality of Education: (QoE); Inclusion & Social Justice (I&SJ).

External Review of Governance Progress Report September 2022

Although there is still much work to be done, we are confident that we have recruited a Trust Board that has the skills, capacity and determination to take on the additional responsibilities the proposed growth would entail.

On reviewing our progress against the action plan, the DfE commissioned National Governors Association (NGA) consultant stated:

- *In the assessment of the NLG, the plans afoot mean that the trust board governance will be meaningfully structured, strategically focussed, will improve the capability and capacity.*
- *All the interested schools, the executive team and the trustees are working collaboratively to establish the model for the reformed trust. They have also worked through how the newly formed trust will incorporate the Schools Learning Alliance to the benefit of all the schools concerned.*
- *The rapid progress made to date demonstrates trustees' commitment to improvement, and whilst much of the good practice is very new, trustees are determined to make it work.*

Structure – Target Operating Model

By structure, we mean the operating systems or model we will use to structure the Trust once it is formed; once it begins to operate as a single entity with several schools, and how the Trust's finances will be managed. For this work we commissioned Chris Kirk of CJK Associates to advise us. Chris is a former civil servant at the Department for Education and a Senior Partner with PWC; Chris has a wealth of sector expertise and works with several MATs, advising on Systems & Structure.

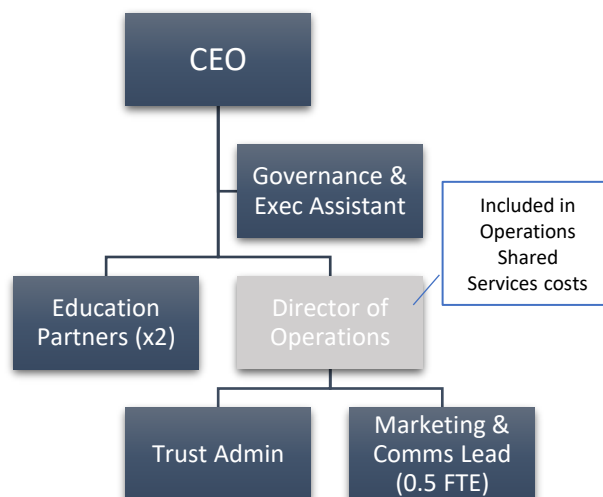
Chris began his work with us in June 2022. This work comprised the collection and analysis of data on current arrangements across the 10 schools, the creation of a variety of options for future design, one-to-one conversations with all 10 Heads, a meeting with all School Business Managers and 3 workshops with Headteachers, Governors and Trustees, where options have been vigorously debated and developed.

The focus of this analysis was on what schools spend on back-office functions and how we will incorporate school improvement strategies and the SLA into the Trust. Back Office functions include Finance, Human Resources, IT and Estates. These services currently cost the 10 schools approximately £1.5m to run, which is £320 per pupil or 5.6% of revenue.

Head Office

The Orchard Learning Alliance will need a head office and an Executive Team, to lead the Trust, provide challenge and support to schools, and lead the SLA. We think that at some point in the future it will also need some help with [Marketing](#), especially to help schools if pupil numbers begin to fall, but also to improve links with parents and communities; attract best candidates for vacancies and increase potential for additional income generation.

The estimated cost of this team is approximately £600K and would require a 2% top-slice from schools.



The Chief Executive

Trustees have appointed Tom Bartlett as the CEO of the Orchard Learning Alliance. The CEO is the Accounting Officer for the Trust and the role includes specific responsibilities for financial matters. It includes a personal responsibility to Parliament and to the Education & Skills Funding Agency's (ESFA) funding officer, for the Trust's financial resources. The role of the CEO is to implement the strategic framework established by the trust board and is responsible for the operational and day to day running of the Trust.

Education Partners

To provide OLA schools with additional support and challenge, the OLA will employ Education Partners to work alongside and support schools and lead the future development of the SLA. At full implementation it is likely that these will comprise of two full time positions, but in the implementation stage it is likely that it will be just one full time equivalent role. The duties will include:

- Support schools with self-evaluation and identify strengths and areas for development
- Support local boards with Headteacher’s performance management
- Meet Headteachers on a regular basis to provide support and challenge to school improvement strategies and develop a better understanding of each school
- Work with leaders to discuss outcomes of SLA challenge activities and agree, monitor and evaluate follow up action plans
- Identify areas of excellence to showcase to other schools
- Liaise with Trustees and CEO to provide information about all OLA schools to the Trust Board
- Communicate Trust-wide progress to the CEO and the Trust Board
- Organise peer reviews of schools where necessary
- Oversee the smooth running of the SLA and line manage SLA administrator
- Further develop links with other MATs and market the OLA Trust
- Research and, where appropriate, involve OLA schools in national programs such as National Challenge Partners
- Develop a partnership approach with all OLA schools through regular visits and facilitate support and advice if required
- Review school improvement priorities
- Work with Headteachers to develop aligned documentation for OLA schools to complete – e.g. SEF, SDP and shared policies
- Organise and facilitate OLA schools’ forums and meetings
- Working alongside Headteachers and Safeguarding Leads, develop and align Trust wide Safeguarding systems and practices
- Work with schools to create effective provision for those pupils with high needs

Promoting the SLA

Through promoting the Schools Learning Alliance, it is envisaged that we will be able to generate additional funding streams for the Trust. The SLA now has 35 schools, including schools in other Multi Academy Trusts. In the past the SLA has been commissioned by Wokingham to provide support for schools and we have opened a dialogue with the Local Authority to see how this might be enhanced and developed in the future.

School Improvement Services

The Orchard Learning Alliance was born out of the Schools Learning Alliance and from the outset we made a commitment to keep the SLA - its ethos and its many and varied school improvement strategies - at the heart of our new Trust. When we met a year ago, the SLA had 25 schools but it has continued to grow and now has 35 – including 5 secondaries.

The SLA will be Headquartered within the Orchard Learning Alliance. Schools within the Orchard Learning Alliance will automatically be members of the SLA and will continue to benefit from working collaboratively with all other SLA schools working across all the different hubs. All SLA schools are able to access these services (see diagram above).



Exclusive to the Orchard Learning Alliance

In addition, schools within the OLA will also benefit from these school improvement activities:



1. Joint INSET Day	The Orchard Learning Alliance will plan an annual joint INSET Day for all schools within the OLA, to bring staff from across the trust together for training and celebration.
2. Peer Review Follow-Ups	Education Partners will support headteachers with 30, 60 and 90 day follow-ups after all peer reviews, to monitor and evaluate the impact of actions and recommendations from the review.
3. Regular Meetings	The CEO and Executive Team will arrange regular meetings to bring OLA Leaders together for planning and training.
4. Individual School Leadership Meetings	The CEO and Education Partners will act as Line Managers for Headteachers, providing them with support and challenge on a regular basis.
5. School Health Checks	Each school will have a wealth of data and school improvement plans. Education partners will review and discuss current priorities with each school and compare them with all schools in the trust. Where supported is required, this will be drawn from experts within the trust.
6. Wellbeing Checks	We will provide up to date toolkits for Headteachers to help manage their own wellbeing and that of their staff.
7. Performance Management	The CEO and Education Partners will support Headteachers and Local Governing Boards in the Performance Management process.

8. Inter-School Events	We will arrange regular sporting, creative and cultural events across the Trust, providing opportunities for pupils and staff to meet, interact and compete.
9. Bespoke Support	When a critical need for additional support arises, the Executive Team will work with schools to provide a bespoke package.
10. Annual Review	The Executive Team will collaborate with Headteachers to provide each school with an annual review.
11. Festival of Education	Each year trust leaders will attend the festival of education at Wellington College to reflect on current educational systems and seek inspiration to adopt new ones.

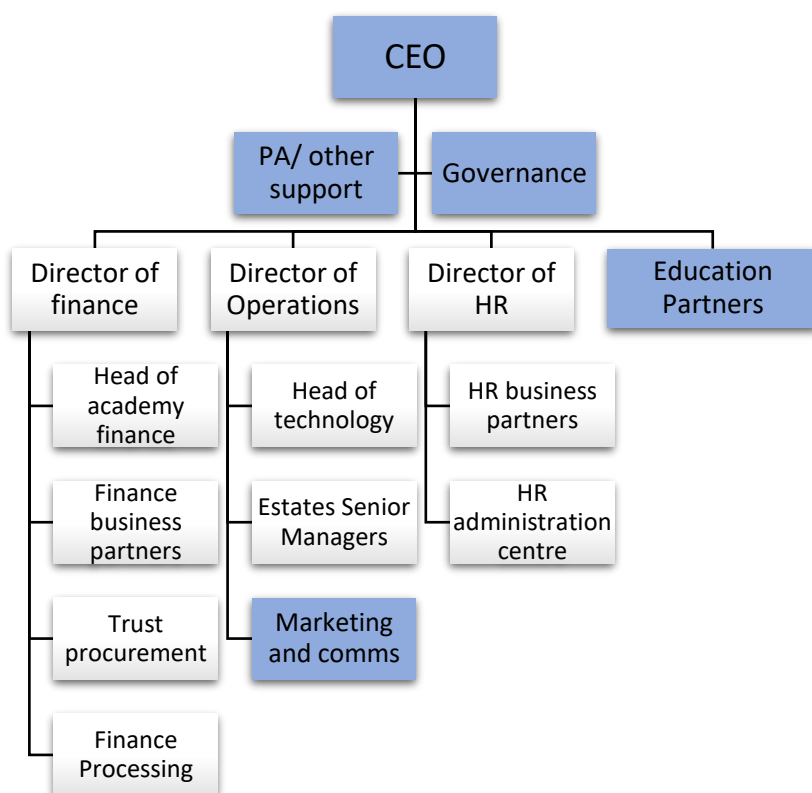
Shared Services

We considered different structures for delivering back office functions. A study of the sector shows a range of structural models are in operation, on a spectrum from, leaving schools to operate as they did before with very little central involvement or support, to the other end of the spectrum where all operations and policies are homogenised and branded, and services outsourced. Neither of these extremes was appealing. The former begs the question why join a Trust if nothing is going to change or improve and the latter risks schools losing their autonomy and unique identity within their own community.

A popular model that has evolved and is in common use provides schools with centralised support and advisory services but does not actually take over the “doing” of any of the shared services. It was the view of the steering committee and Trustees that this model is full of duplication and schools end up paying twice: they pay for the advice but they also pay staff to do the work.

The steering group agreed in principle that the best operating model for the Orchard Learning Alliance is one with shared services, sometimes called the Business Partner Model. Staff currently providing back office functions in schools will migrate over time to work for a shared services team for the Trust. As they migrate, their salaries will be paid for by the Trust. We anticipate that the migration to a shared services model will take approximately 3 years, and possibly longer.

The Orchard Learning Alliance will create shared services for our finance, HR, IT and estates functions. These services currently cost the 10 schools approximately £1.5m to run, which is £320 per pupil. The future design proposed by our consultant is slightly more expensive, at £1.6m, £327 per pupil. This reflects the fact that trust financial management is more complex, and therefore expensive, than maintained schools, mostly because academies have to have their accounts externally audited every year. It also does not take account of the potential savings that will be made through procurement and it does not take account of the benefits schools will feel as responsibility for these services is centralised, freeing up the time of leaders to focus on teaching and learning. It also does not take account of any additional income schools might attract once they leave the Local Authority’s control, although from our investigations so far these will only be very marginal.

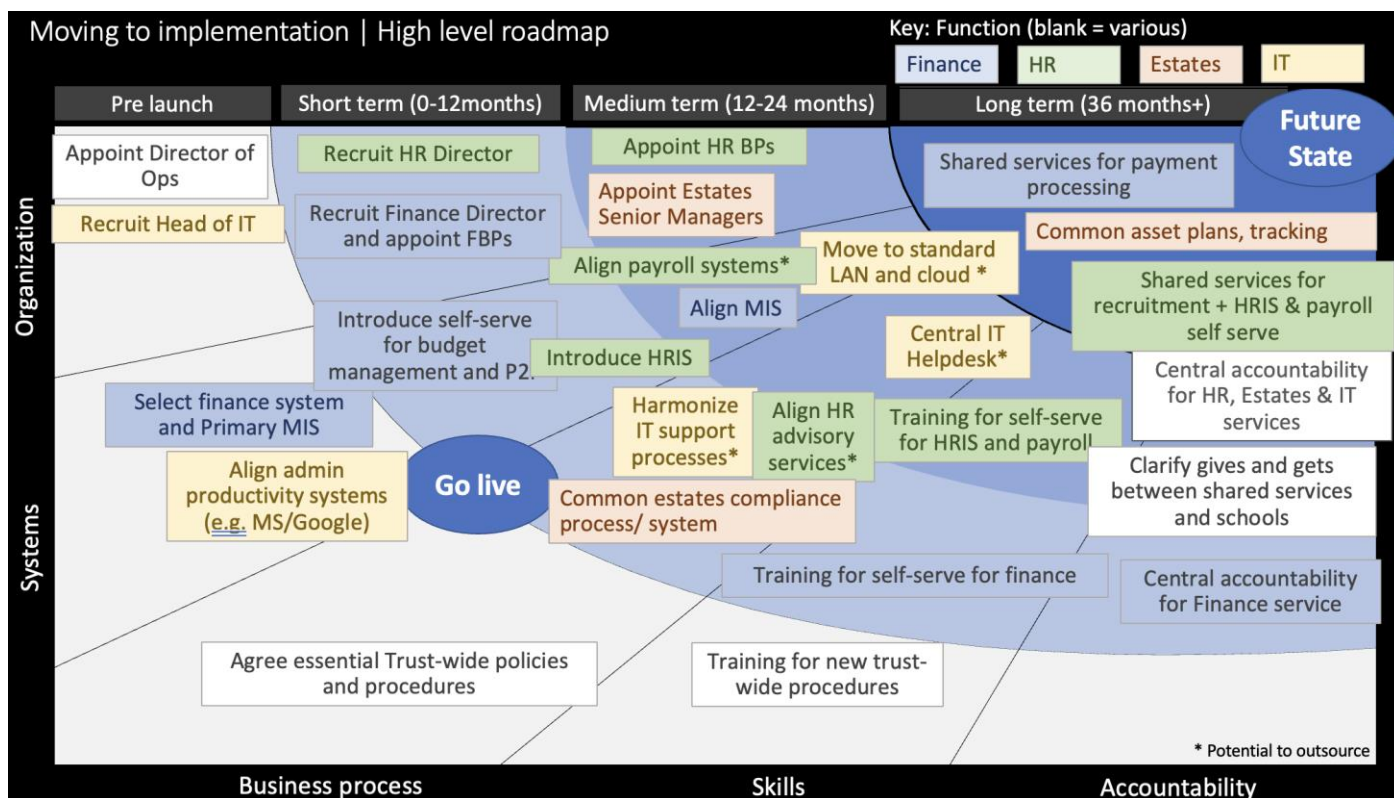


Possible Organisational Structure of Back Office Shared Services (Boxes in blue fall under the Head Office)

We believe that with careful consideration, savings are still possible in the model presented by our consultant and we will endeavor to ensure that the slight increase is neutralized. This proposed shared services model will cost approximately £1.6M, based on notional sector salaries and will require a services

fee of up to 5.7% of income, in addition to the head office top slice. However, it should be remembered that these are costs which are already borne by each school. As the shared services team is formed, and as staff migrate from their school to be part of a shared services team, the cost will be paid for by the service fee.

Below is a model of how the migration could be implemented over a three-year period. We recognise that the recruitment to the shared services team might be disruptive to some staff in schools, but it also provides current staff with career development opportunities. The Trust Board is committed to providing training for staff where this is needed to support their development. The roadmap will not be linear. We anticipate a meandering journey, as at every step we will need to pause and assess risk. In particular we will have to assess the impact of decisions on smaller schools and on individual staff members.



There are several risks and opportunities we will have to bear in mind once the migration begins:

Central/ local overlap during transition

During year 2 there are some central service roles which need to be funded before schools are able to remove the cost of their local services. The maximum exposure is c. £750k if all central team roles are in place before reducing local cost. In practice, slotting and matching means the actual amount will likely be less. Bear in mind that in a trust model without shared services, this additional cost is largely baked into the ongoing operating model.

'Cashable' vs 'productive time' savings

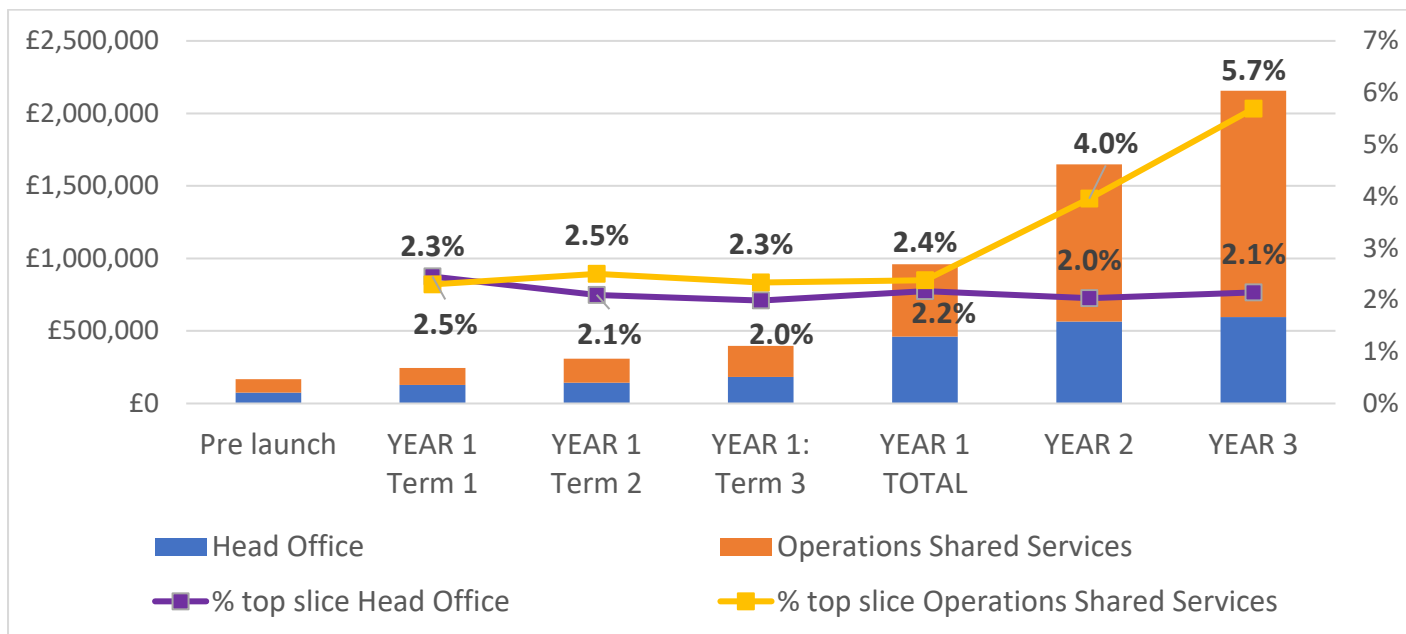
The time savings released from local operational activity when shared services are in place includes part of some people's roles (e.g. time spent on finance, payroll, recruitment administration from PAs, Secretaries, Administrators). Schools may not choose to realise this saving as 'cashable' – they may prefer to identify other activities and increase what is called 'productive time'. This has a cost, or looked at positively, a 'productive time' value, of £73.3k.

Slotting and Matching

We will support staff working in Trust schools to slot and match into new roles within the shared services team. Some staff may not wish or may not be able to slot into the new shared services model and the OLA, or individual schools, may choose to continue to fund roles which are not part of the model. It is useful to come back to what is in the interests of pupils as a 'north star' when having this discussion.

Shared Services Costs

The cost of this shared services model will rise as more staff migrate to the shared services team. This is a model that shows how this might evolve over time.



Summary of Costs & Benefits

On joining the Trust, Schools will be asked to pay a top slice of approximately 2% to pay for the Head Office and School Improvement functions.

As the Shared Services team is assembled, schools will be asked to pay a service fee. Our modelling suggests this will start at about 2.5%. However, it will depend on the pace and scale of the migration process, and again, it is worthy of note that these are costs which schools currently bear locally, they are not new costs.

Some of the benefits of the shared services model include:

- ✓ Staff in more specialised roles
- ✓ Increased flexibility e.g. sharing of staff
- ✓ Less duplication, improved efficiency
- ✓ Improved peer support
- ✓ Group buying power
- ✓ Professional and career development
- ✓ Shared data, analysis and reporting

Reserves Policy

Schools joining the Trust with reserves will have those reserves ring-fenced. Therefore, if schools have been building up reserves for a specific project, they should rest assured that this money will be protected. Over time the Trust will endeavour to build up reserves of its own. It is also worthwhile noting here, that the Trust is seen by the Department for Education as a single entity. If one school gets into financial difficulty, it is the Trust, and not the Department for Education which will be required to help. Also, it is worthy of note that as a Trust, with responsibility for the life chances and outcomes of almost 5000 pupils, it is essential that resources are allocated where the need is greatest.

Capital Funds

At the moment, schools have to submit a Conditions Improvement Fund (CIF) bid for any capital project – a time consuming task which has no guarantee of success. As a Trust with over 3000 pupils, we will automatically qualify for an annual capital grant. We expect this to be well in excess of £500K per year. In consultation with Governors, the Trust Board will develop a policy for how capital grants will be allocated.

Trust Capacity and Academy Conversion Funds

Once an Academy Order has been issued by the Regional Director of Education, we will become eligible to apply for a grant from the Trust Capacity Fund of up to £100K. This fund is designed to support Trusts to grow. In addition, each Local Authority maintained school will be given a grant of £25K to support it through the due diligence process. It would make sense for these grants to be pooled so that we can appoint a single firm of solicitors to support schools through this process. It is envisaged that by pooling these resources some savings can be made.

School Teachers Pay and Conditions Document (STPCD)

All teachers employed in Local Authority maintained schools are governed by the School Teachers Pay and Conditions Document. This sets out the statutory requirements for teachers' pay and conditions for maintained schools and schools and local authorities must abide by these. Multi Academy Trusts do not have to adopt and adhere to STPCD and some Trusts have opted out. Waingels has always stayed within the STPCD and the Trustees of the Orchard Learning Alliance will adopt and adhere to the School Teachers pay and Conditions.

Future Threats & Opportunities

The biggest threat facing schools, whether under a local authority or in a Trust, is funding. Governors will all be acutely aware of the pressure on school budgets brought about by unfunded pay awards, the cost of energy and inflation running at 10%. It is our belief that we will be able to weather these storms better together.

Recruiting and retaining good quality staff is another challenge all schools face in the South East, especially in areas like ours which do not attract a London salary weighting. We are committed to developing a people strategy that recognises that the people who work in schools are our most valuable resource. We are determined to ensure that the Orchard Learning Alliance is a great place to work. We will use our scale to attract and appoint the best entrants to our profession; we will be a flexible employer, supporting teachers and staff to return to work after maternity or parental leave, or returning from a career break, and we will consult with staff in developing an Employee Assistance Program that finds ways to reward staff for their efforts and commitment.

An additional strain on funding, now and in the future, is the growing number of high needs children for whom no places are available in special schools. We are determined to prioritise the development of a team of therapists: Art, Drama, Play, Occupational, Speech & Language to supplement the work we all do

in schools to support children with high needs which will enrich their experiences and enhance their life chance.

Young people's mental health, adversely impacted by the pandemic will only get worse with the onset of a recession and further cuts in public spending. We are determined to explore creative strategies to ensure young people's mental health is supported and promoted. To exemplify this, we will support all schools to dedicate a small area of their land to planting and growing an Orchard (if they do not already have one – many do) and that these orchards become a safe and calm place for children to learn in.

Our short to medium term priorities will be to support schools through the academisation process, once academy orders have been approved, to implement the shared services migration and focus on providing stability through this. We recognise that change can be difficult, and we will take care not to over-reach our capacity or over-burden schools with new initiatives.

Initially, Waingels will provide a base for the executive and finance teams (the first of the shared services to be assembled). However, in the medium term we need to identify a location for a permanent base for the Orchard Learning Alliance; a base that should not just accommodate all the shared services and executive teams, but also include a training and meeting base for the SLA.

In the medium to long term our growth priorities will be to attract additional schools from our local community, especially secondary schools, to bring our total pupil population up towards 10 000. We believe this will give us long term security. However, it is again worth reminding ourselves that at 10 schools and close to 5000 pupils, our Trust will be in the top 20% of Trusts nationally by size.

Next Steps

Starting this week, we have a period of consultation with our communities. We have kept staff and parents up to date as our conversations have developed over the last year. I will join Governors and Headteachers at these consultation meetings. Please feel free to share this document with your parents and staff.

As soon as you are ready, please put this resolution to a meeting of your full Governing Board: "The Governors of (name) school resolve to make an application to the secretary of state to become an Academy and join the Orchard Learning Alliance".


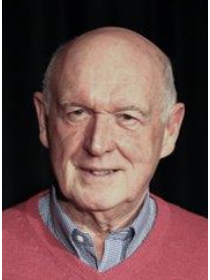


I will begin work with Headteachers in the meantime on populating the Academy Application form, so that soon after the resolution has been passed, we can submit them all together. Designing a logo and creating a website for the Trust will become a priority. If any questions or queries arise, please do not hesitate to contact me.

Summary of Benefits






- ✓ This is our Trust – a self-reliant bid to establish a Multi Academy Trust or family of schools, based on our values, for our community, that each of us has helped to create.
- ✓ The ethos of co-design and co-construction does not end with the formation of the Trust – it will continue and it will become a beacon for other schools to join us in the future.
- ✓ A top-slice of 2% of revenue is a very competitive and reasonable price and will ensure all schools are fully supported and challenged in their development.
- ✓ A shared services model will create efficiencies, allowing more of our income, resources and time to be spent where it is most needed, supporting children’s learning.
- ✓ By head-quartering the Schools Learning Alliance within the OLA, we will keep school improvement and the professional development opportunities that go with it, right at the heart of our Trust – not as an after-thought or add-on.
- ✓ School’s reserves will be ring-fenced and we will have automatic access to capital grants from the Department for Education.
- ✓ Schools will retain their unique identity within their own community and through Local Governing Boards, representation on Trust Board Committees, and through the Stakeholder Forum, schools will continue to have a voice in strategy and policy as our Trust evolves.
- ✓ The scheme of delegation will mean schools retain control of their own curriculum, but it will free up leader’s time from mundane policy development.
- ✓ Our People Strategy will put staff development and well-being at the heart of our ethos.
- ✓ We have a strong, diverse and local Board of Trustees who bring a wide range of relevant skills and long history of community and civic responsibility.






Appendix 1 - Members

We have 3 Members who are independent of the Trust Board. This means we are compliant with DfE guidance. However, we are seeking to appoint two additional Members and are currently considering two expressions of interest. If we are successful in these appointments we will have 5 Independent Members.

Name	Photograph	Biography
Professor Carol Fuller		Head of School, Institute of Education. At Reading University
John Kick		Retired Human Resources Executive, Hewlett Packard
Michael Marsden		See below. As Chair of the Trust Board, Mike is automatically a Member as well.
Amena Sutton		Retired Secondary School Leader, currently working as a Magistrate.

Appendix 2 - Trustees

Name	Photograph	Role & Biography
Michael Marsden		<p>Mike is the Chair of the Trust Board and has close to 20 years' experience as a school governor first at Willow Bank Juniors and then at Waingels.</p> <p>Mike holds a B Eng in Mechanical Engineering and an MBA and he is a Senior Programme Manager in Research & Design at Plantronics, an American based electronics and technology company.</p> <p>Mike brings a range of skills including strategic planning, financial and change management.</p>
Caroline Norris		<p>Caroline is co Vice Chair of the Trust and has been a school Governor at Waingels for 15 years.</p> <p>Caroline is a recently retired local Headteacher and holds a Bed (Hons) and National Professional Qualification for Headteachers (NPQH).</p> <p>With a lifelong career as a teacher and school leader, Caroline brings a wealth of skills in Education, in particular the Primary sector and in Special Educational Needs & Disabilities. Caroline has worked at several Wokingham Schools as a teacher, Deputy Head and as Headteacher and she has a rich understanding of the local educational landscape.</p>
Dave Williams		<p>Dave is also a co Vice Chair of the Trust and has over 20 years' experience in School Governance, including the last 10 years as Chair of Governors at Hawkedon Primary School. Dave also sat on an Interim Executive Board for a local school when it got into difficulty.</p> <p>Dave is a serving Police Officer in the Metropolitan Police Specialist Protection team. He is widely experienced in Safeguarding, Anti-Terrorism, First Aid at Work & Mental Health at work.</p>
Nayana Bharti		<p>Nayana has been a Governor at Waingels for 20 years, and became a Trustee in 2021. Nayana holds an LLB Law degree and has over 30 years' experience as a solicitor working in corporate governance, financial services, accounting, tax, HR, payroll and insurance.</p>
Gareth Hayes		<p>Gareth has been a governor at Willow Bank & Waingels for 13 years and became a Trustee of the Waingels Academy Trust in 2019.</p> <p>Gareth has a BSc in Electronics and Computer Science and held Technical Director and Chief Engineer roles in Telecoms and Aerospace industries, but is now working mostly as a consultant in digital security.</p>

Maria Kambouri		Maria is an Associate Professor of Early Years Education at the University of Reading and has a PhD in Education. Maria is a Qualified Teacher, an experienced researcher; a lecturer in early years education and she has worked on a variety of projects and contexts supporting children and parents from disadvantaged background, LGBTQ+ matters, and CPD development.
Donald MacDonald		Donald has been Governor for over 30 years at Loddon Primary School in Earley, where he has chaired the Finance and Personnel committees throughout that period. He is a Director for NatWest Bank, running a Team who look after the Commercial Mid Market. He also has responsibilities for Climate, Sustainability and Wellbeing. He has been Chair of Loddon District Scouts for nearly 20 years, a group which comprises over 1200 young people and adults.
Beth Rowland		Beth has been a Governor at Southlake & Highwood schools for over 20 years. She is a director of the Berkshire Credit Union and she is a local Councillor and sits on Wokingham Borough Council education committee. She is also Deputy Mayor.
Dawn Smith		Dawn is the Chair of Governors at Churchend Primary Academy, a standalone Trust which will be dissolved when Churchend joins the Orchard Learning Alliance. Previously she was chair of governors at St Edwards First School in Slough. Dawn is the full time Designated Safeguarding Lead at a Multi Academy Trust in Slough.
Rebecca Stewardson		Rebecca is Chair of Governors at Willow Bank Infants and a Governor at Willow Bank Juniors. Rebecca studied Law and German at University and has worked extensively in Human Resources, incentives, rewards and motivation, staff well-being, gender pay-gaps; bonus schemes and HR Policy.
McFoster Tembo		Foster holds a PhD in Accounting, an MBA and is a member of the Association of Chartered Certified Accountants. Foster is a Senior Lecturer at Coventry University and is the academic course director for Accountancy, Finance & Marketing. He has experience as an auditor and is committed to civic responsibility, auditing the accounts for several charities & churches.

Contact Us

For any queries or enquiries please contact the Orchard Learning Alliance as follows:

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