



BDMAT
Birmingham Diocesan
Multi-Academy Trust

Birmingham Diocesan Multi-Academy Trust

Life in its fullness for all

Success for all

Positive well-being for all



Strategic Plan

2019 - 2024

Section 1 - Executive Summary

BDMAT issued its first strategic plan, covering the period 2018-2019 in the autumn term 2018. Since then there have been a number of significant staffing changes and developments, including the expansion of the Trust which has led to the development of a revised strategy document to cover the period 2019-2024. This Strategic Plan sets out the route for the development of the Trust to ensure that all our schools are effectively supported to develop into or sustain 'good' judgements in their Ofsted and SIAMS inspections whilst delivering our Trust's mission and values. The MAT Board and its executive, acknowledge the need to show flexibility and resourcefulness in changing times, and the willingness to deviate from this document and its contents should it be in the interests of the Trust, and the children and families we serve, to do so.

The key changes since the last strategic plan include:

Central Team

The appointment to the executive of Mrs Sam Cosgrove as Chief School Effectiveness Officer; Sam brings to the post 10 years of headship experience, a number of these as Executive Headteacher of the three schools within the Barchelai Trust in South Birmingham;

- Mr Christopher Manning appointed to the new executive post of Chief Finance and Operations Officer. Chris joined us from another multi-academy trust here he was Finance Director and has over 11 years' experience in the sector;
- The appointment of two School Finance Partners and a finance apprentice;
- Appointment of our Executive Leader and two Teaching and Learning Consultants to work across schools; and
- Appointment of a new Administrator.

School growth

Since 2017 BDMAT has grown from the original 6 schools to 16 schools, in line with our original strategic plan, having admitted the following schools:

- Coleshill CofE Primary School – a North Warwickshire local authority school that converted in September 2018;
- St Margaret's CofE Primary School – a Solihull local authority school that converted in September 2018;

- The merger of the Barchelai Trust of three schools, St Michael's CofE Primary (Bartley Green), Quinton CofE Primary and Nonsuch Primary (our first non-church school) into BDMAT on 1st January 2019;
- Holy Trinity CofE Primary, a stand-alone academy, joined BDMAT on 1st January 2019; and
- The merger of the four Heartwood MAT schools in Warwickshire in September 2019 (Woodside, Newton Regis, Austrey and Warton Nethersole CofE primary schools).
- In addition, BDMAT has now received planning permission for the construction of its first secondary school, Christ Church CofE Secondary Academy which we plan to open in September 2021; the Regional Schools Commissioner has also given approval for Lady Katherine Leveson CofE Primary School (Solihull) to join in September 2020 (subject to due diligence).

Section 2 – BDMAT’s mission, vision, values and priorities

Our mission is:

To provide high quality education within a Christian framework that allows all pupils to reach their full potential through experiencing a broad and balanced curriculum whilst ensuring staff have a good life / work balance and are fulfilled in their roles.

Our values

We have adopted the values of the Church of England, as articulated in the document ‘Deeply Christian, Serving the Common Good’ which sets out the vision for education that the Church of England believes should be seen in all schools, and not just those of a Christian foundation. As a result, the values apply equally to our church schools and our non-church school.

Our key values are

Wisdom

Hope

Aspiration

Koinonia (community)

Dignity

Respect

These are lived out in our schools and we aim to provide pupils and parents with schools which are:

Educating for Wisdom, Knowledge and Skills

Good schools foster confidence, delight and discipline in *seeking wisdom, knowledge, truth, understanding, know-how, and the skills needed to shape life well*. They nurture academic habits and skills, emotional intelligence and creativity across the whole range of school subjects, including areas such as music, drama and the arts, information and other technologies, sustainable development, sport, and what one needs to understand and practise in order to be a good person; citizen, parent, child, employee, team or group member, or leader.

Educating for Hope and Aspiration

How we learn to approach the future is crucial. Good schools open horizons of hope and aspiration, and guide pupils into ways of fulfilling them. They also cope wisely with things and people going wrong. Bad experiences and behaviour and wrongdoing need not have the last word. There are possibilities for *healing, repair and renewal; repentance, forgiveness, truth and reconciliation. Trust, generosity, compassion* and hope are more fundamental than meaninglessness suspicion, selfishness, hardheartedness and despair.

Educating for Community and Living Well Together

Education needs to have a *core focus on relationships and commitments, participation in communities and institutions, and the qualities of character* that enable people to flourish together. We believe our living is inextricably involved with others, sharing our humanity and life on a finite planet. If others are of ultimate worth, then we are each called towards them and to contribute responsibly to our communities.

Educating for Dignity and Respect

Human dignity, the ultimate worth of each person, is central to good education. The basic principle of *respect for the value of each person involves continual discernment, deliberation and action*, and schools are one of the main places where this happens, and where the understanding and practices it requires are learned. This includes vigilant safeguarding. It is especially important that the equal worth of those with and without special educational needs and disabilities is recognised in practice.

Our vision

'Deeply Christian, Serving the Common Good' is inspired, as we are within BDMAT by scripture, in particular John 10:10 where Jesus declares "*I have come that they may have life, and have it to the full*". The words of Jesus act as a guide for our vision, which is encompassed in our three guiding principles:

Life in its fullness for all

As stated, BDMAT is committed to the declaration of Jesus, "*I have come that they may have life, and have it to the full*". It is our mission to ensure that we act as God's servants in ensuring that this vision of Jesus can be delivered. We think we can best achieve this through creating inspiring curricula which is specific to each school – our schools cover a large geographical area and serve such contrasting communities that it would be inappropriate to have a 'one-size-fits-all' curriculum across our settings. What we have established though, are curriculum networks for curriculum leads to attend in order that they can share best practice and help support one another.

We accept the importance of literacy and numeracy as these subjects can unlock all aspects of education and open-up opportunities for all; one of the greatest Christian duties on us is to make sure that each child has the opportunity to achieve in these subject areas. Poor literacy and numeracy skills are the greatest barrier to social justice, especially for the most vulnerable pupils.

Whilst a key focus of the trust will always be on the promotion and improvement of literacy and numeracy it will not be at the expense of the child experiencing a wide range of subjects and activities in our schools, both in the primary and secondary sectors. Pupils therefore should have plenty of opportunities to learn about the world through the humanity subjects; they should experience the arts as both artists and as audiences; and be introduced to a wide range of sports. These opportunities in the primary and secondary stages are of particular importance as they encourage children to become 'rounded - individuals' and give them experiences that they might wish to develop in the future for either employment or social reasons.

As an organisation with Christian values at its core, we wish all to know who Jesus is and the key aspects of Christian teaching. Many of our staff and pupils have a faith other than the Christian faith, some may have no faith. Our schools serve all and all are welcome. We therefore provide an education within a Christian framework that we feel will be appropriate to those with faith or none equally. A key aspect of our work is to develop pupils' spirituality, be this linked to Christianity or otherwise.

Our commitment to ensuring 'life in its fullness' extends beyond our pupils and is integral to ensuring a life/work balance for our staff. We will examine ways to reduce workload through collaboration and support. and will put in place a 'life / work 'balance charter to ensure all leaders are committed to this agenda.

Success for all

In the current world of education, 'success' is often measured by literacy and maths attainment alone at the end of key stages. At BDMAT we are committed to the holistic development of each child and we therefore see *success* in a much broader context. We want our pupils to experience a range of subjects and experiences in order that they have the opportunity to achieve within these. As previously stated, this approach should not be at the expense of aiming high academically for all pupils – especially those who are vulnerable. Therefore, we expect all of our schools to aim for FFT (Fischer

Family Trust) 50 targets this is in line with national attainment) as a minimum but also to set aspirational targets of FFT 20 (aiming for performance in the top 20% of all pupils nationally).

Success for pupils is likely to be secured if staff are also 'succeeding' in their roles. Performance management and development reviews will be undertaken with all staff on an annual basis with at least one mid-point review. Leaders across the MAT, both at a central and school level should be demonstrable in their praise for staff. Staff should also be encouraged and supported to improve their skills and knowledge etc through appropriate CPD – each member of staff should have an opportunity for an individual CPD plan for the year that clearly helps them to succeed and improve.

Positive well-being for all

Two-year old children who start in our school nurseries in September 2019 will leave compulsory education in 2035 and therefore we have a responsibility to educate them in preparation for what society is likely to be in the future. As a result, pupils will need to be supported to be resilient and be capable of being able to transfer skills. They will also need strategies to ensure that they look after their health – both physical and mental. Therefore, each school should have a comprehensive personal, social and health education programme, incorporating a Relationships and Sex programme that meets current recommendations from the Department for Education and the guidance issued by the Church of England through 'Valuing All God's Children' and subsequent advice. The majority of staff who have direct contact with pupils should have mental health training and be aware of the symptoms of mental health; pupils and their families can then be supported or signposted to the relevant professional support.

The well-being of staff is also important to the Trust and we will therefore ensure that we have appropriate occupational health services to support any staff who require this. We will also establish access to a counselling service for any staff who require this, either for professional or personal issues. The executive and headteachers will all receive training on identifying stress in themselves and their staff and provide guidance on how best to support staff.

Our priorities 2019 – 2024

With the above mission, vision and values in mind and reflecting on the current position of our schools, directors have set the following priorities, which will be measured through our strategic aims and KPIs:

Our pupils:

- get a full and exciting curriculum
- achieve better than average attainment
- achieve better than average progress
- have attendance above that seen nationally
- who are disadvantaged, have an excellent start to their education

Our schools:

- embody the Christian vision and values of BDMAT
- are judged as good or better by Ofsted and SIAMS
- are exemplary at safeguarding our pupils
- have high parental satisfaction

Our staff:

- love working for us
- have higher than sector attendance
- are lifelong learners

Section 3 – Strategic aims

Whilst our existing strategic aims were clear and captured the work that BDMAT is involved in, directors agreed that some minor amendments were required and these have been incorporated into this new strategic plan.

Strategic aim 1: Education is led by BDMAT's vision and values, and for our Church of England schools these are embedded within a Christian ethos: **Owner: Chief Executive Officer**

Strategic aim 2: To work in partnership with parents and carers to promote pupils' social, moral, spiritual, cultural and physical development within happy and caring environments: **Owner: Chief School Effectiveness Officer**

Strategic aim 3: Every school provides a broad and balanced curriculum that equips all pupils to thrive, achieve their goals, succeed in later life and contribute to a diverse society and respect the environment: **Owner: Chief School Effectiveness Officer**

Strategic aim 4: Pupils are provided with effective pastoral support and safeguarding arrangements meet all national and local requirements: **Owner: Chief Executive Officer**

Strategic aim 5: Our schools are at the heart of the communities that they serve, collaborating with the church, other schools, stakeholders and organisations in the area to best support their community: **Owner: Chief Executive Officer**

Strategic aim 6: Working in partnership with parents and carers we promote pupils' intellectual development as evidenced through external and internal indicators that demonstrate the vast majority of pupils make good or better progress in our schools and as a result, attainment is high in all of our schools or improving rapidly: **Owner: Chief School Effectiveness Officer**

Strategic aim 7: All of our schools are graded 'good' or better by Ofsted or are improving quickly towards achieving 'good' at the next inspection: **Owner: Chief School Effectiveness Officer**

Strategic aim 8: The practice of staff is enhanced by high quality professional development and performance management systems: **Owners: Chief School Effectiveness Officer & Chief Finance and Operations Officer**

Strategic aim 9: The Trust has highly effective pastoral arrangements in place for staff who, as a result, feel supported and have good life / work balance and the Trust is recognised as a good employer for staff: **Owner: Chief Executive Officer**

Strategic aim 10: The Trust is sustainable, with secure finances allowing high quality services to underpin our work, ensuring staff in schools are able to concentrate on providing effective provision for their pupils: **Owner: Chief Finance and Operations Officer**

The progress that the organisation is making towards meeting these strategic aims will be measured on a termly basis at full board and committee level through a comprehensive set of key performance indicators (KPIs) (see section 10). School Improvement Advisors will also regularly work with headteachers and local academy board governors to assess each school's progress towards these KPIs.

Section 4 – Growth strategy

Evidence suggests that for a MAT to be financially sustainable it needs to have the income associated with at least 3,000 pupils; in January 2019 we reached this number on roll. It is also recommended that to be able to provide an extensive range of services that successfully impact upon pupil achievement the number on roll needs to be closer to 5,000. The directors are therefore committed to increasing the number of pupils it educates but will now move into a steadier phase of increase in the number of schools joining the Trust.

As BDMAT was established as a 'mixed-MAT', our articles allow us to admit both church and non-church schools. We are therefore happy to consider the application of any school into our MAT so long as they are willing to follow our values and expectations. Currently, we have one non church school within BDMAT, Nonsuch Primary in Birmingham.

Directors have set the initial growth period to be the formation of around 20 schools in the trust, once this figure is achieved, they will decide whether further growth is right for the trust. The table below gives an indication of how this growth might occur over the next few years. As can be seen, the majority of this is predicted to have occurred in the first two years of the trust's development; this is a conscious decision in order to quickly raise the resources within the trust in order to build an effective central team to effectively support our schools.

The secondary school identified for 2021-2022 is Christ Church Secondary School (a Free School) which will have 180 pupils per year group, when this is at full capacity in 2025 there will therefore be a planned 900 pupils on roll, 1150 when the sixth form is open. As a result, our growth strategy suggests that by 2025 we should be educating around 5,000 pupils across the Trust. It should be noted that as a diocesan MAT we have a moral duty to support those schools within the diocese that are experiencing difficulties; as a result, if a diocesan school who is not part of BDMAT is placed into Special Measures by Ofsted the trust will re-visit its strategy and examine if it has the capacity to either admit the school or support them through a Service Level Agreement.

2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Sept 2019 – 4 schools join	Sept 2020 – 1 school joins	3 school joins including Christ Church Secondary Academy	Directors to review growth strategy. No planned growth this year	Further growth dependent upon decision of directors
16 schools	17 schools	20 schools	20 schools	

The Church of England, Birmingham and BDMAT are keen to expand the scope of our trust wider than the current primary education focus that we have. We will therefore consider submitting bids to the Department for Education for building additional Church of England secondary schools where there is a need in the area; we will also consider requests from the DFE for non-diocesan schools to join the Trust. Our plan is that in the long-term we will have a secondary school in each of our hubs (further information about or hub structure can be located in section 6).

Embedding our Christian values

As stated in section 2, the work of all within BDMAT is underpinned by our Christian ethos. We believe that those of a different faith or belief can subscribe to our ethos as a set of guiding moral and ethical principles.

In order to ensure that our mission, vision and values are being embedded in all our schools we will ensure:

- a. Each of our Church of England schools receive an annual Christian Distinctiveness visit to focus on how effective the school is as a church school and how prepared they are for their next SIAMS (church) inspection;
- b. Our non-church schools will all receive an annual visit focussing on how effective the school is in embedding BDMAT's vision and values;
- c. School Effectiveness review meetings will ask leaders and governors to reflect on the school's progress towards embedding the BDMAT vision in their school;
- d. We hold an annual residential conference which will be heavily focussed on BDMAT's values and Christian roots;
- e. Executive members are active members of the Church of England Central Education Office's networks;
- f. We will work in conjunction with the Church of England, Birmingham Education Team to ensure all our school staff are supported effectively to embed our Christian distinctiveness; and
- g. That in our church schools the percentage of governors representing the Church of England is at least comparable to the previous designation as either voluntary aided or voluntary controlled.

Ensuring all God's children are safeguarded

As a Christian organisation, we believe passionately in the rights of all. We aim to support the development of a just society where all are treated with respect and dignity. A key role within this is the commitment we show to safeguarding our pupils. We will ensure that safeguarding is always given a high priority within our trust and at each school. To this end we will:

- a. Rather than delegating safeguarding to a committee, it will form part of the agenda of each full trust board meeting – the board will have a designated trustee with oversight for safeguarding;
- b. Ensure that all school safeguarding policies meet the requirements of their area Safeguarding Board;
- c. The trust will have in place a safeguarding policy that covers centrally employed staff;
- d. Audit schools' recruitment processes on an annual basis until recruitment processes are completed centrally;
- e. Ensure that each school will have an annual safeguarding audit undertaken – this report will be issued to headteachers, the executive and the designated member of the trust board; and
- f. Ensure that following safeguarding audits, the headteacher will submit an action plan identifying the actions that will be taken and the timescales for completion.
- g. Safeguarding will be overseen across the Trust by a School Support Officer whom we hope to appoint in the Spring term 2020

Ensuring that all our schools have the correct support to meet of vision

It is imperative that BDMAT offers the correct support to each of our schools; the level of support will be linked to several factors. In the first three years of BDMAT we designated our schools as being either self-sustaining, semi-supported or priority with the focus mainly around predicted Ofsted grades. From September 2020 we will move away from a grading system – although we will refer to some schools needing priority support from the central team. The executive team will examine each school on a termly basis to decide on the level of support that the school requires.

Section 6 - School Improvement

School improvement will always be at the heart of what we deliver, and the trust will ensure that sufficient resources are put in place to effectively support each of our schools, no matter what their current status. BDMAT's school improvement and school effectiveness work is led by a member of the executive, Samantha Cosgrove, Chief School Effectiveness Officer. Within Sam's team there are also the following centrally employed BDMAT staff:

- Victoria Sumner – Executive Leader and School Improvement Advisor
- Tammy Smith – Early Years and Key Stage 1 Teaching and Learning Consultant
- Lou Darby – Key Stage 2 Teaching and Learning Consultant

Schools within local neighbourhoods will work closely together through a 'hub' model, this is to ensure that schools effectively support one another in a localised, practical manner whilst benefitting from the services that a larger MAT can provide. Within each hub strong practice will be used to support teaching that requires improvement; resources will be shared and on occasions there will be joint local governance arrangements.

The trust operates the following 'hub' model to support our schools; each hub is supported by a member of the Central Team:

Birmingham Central	Birmingham South	Warwickshire
St Clement's St Michael's Handsworth St George's Newtown St George's Edgbaston Holy Trinity	Hawkesley St Michael's Bartley Green Quinton Nonsuch St Margaret's <i>Lady Katherine Leveson</i> <i>Christ Church Secondary</i> <i>Academy</i>	Coleshill Nethersole Austrey Newton Regis Woodside Warton Nethersole

'Priority support' schools

At times a number of schools are likely to have significant issues that impact upon them, such as the departure of key staff or significant staff illness. When this occurs, the executive will designate the school as requiring priority support. When schools are designated as requiring priority support by the executive the following are likely to be considered:

- Use of either monthly, half-termly or termly Team Around the School Committee meetings chaired by the CEO with invitations extended to the headteacher, deputy, chair of LAB, Chief School Effectiveness Officer and Chief Finance and Operations Officer and any other professionals commissioned by BDMAT to support the school;

- Temporary appointment of an executive leader (either an existing BDMAT headteacher or a quality assured leader sourced through the Birmingham Education Partnership, a teaching school or similar organisations);
- Suspension of the Local Academy Board and replaced with an Executive Governing Body or Academy Council, usually chaired by a member of the BDMAT Executive;
- Restricted, personalised scheme of delegation;
- Deployment of BDMAT Teaching and Learning Consultants or other quality assured staff from BDMAT schools to support extensively, such as Specialist Leaders of Education (SLEs);
- and
- Commission support from other organisations where BDMAT does not have the capacity to support internally.

Funding for additional support for 'priority support' schools will usually be taken from the school's own resources but on occasions additional central funding may be awarded.

Improving teaching and learning across all schools

In order to improve teaching and learning in all our schools we will:

- Allocate an experienced School Improvement Advisor (SIA) who has a proven track-record in school development through headship – the time allocation will be determined by the school's current needs. All external School Improvement Advisors will be quality assured on at least an annual basis. SIAs will issue records of visits for each of their visits to schools; these reports will be distributed to the Chair of BDMAT, CEO, Chief School Effectiveness Officer, Headteacher, Chair of LAB and link directors.
- Deploy centrally employed staff to support the development of teaching and learning, especially in our 'priority support' schools.
- Offer an impressive CPD package to all our schools, focussed on improving teaching and learning and leadership, linked to our strategic aims and KPIs – each CPD package will be rated by staff attending in order to quality assure our CPD provision.
- Facilitate shared training day(s) across BDMAT schools through the hub model, where appropriate.
- Closely align key performance indicators for headteachers across BDMAT regarding appraisal to promote consistency of challenge.
- Undertake school effectiveness visits on a regular cycle for all schools within BDMAT with the focus to be determined on the needs of the school. Where required, deploy Specialist Leaders of Education to work across the trust from Teaching School Alliances.
- Develop staff within the trust to support staff across all schools.
- Commission support from other organisations, such as Teaching School Alliances and the Birmingham Education Partnership (BEP), where the trust does not have internal capacity / experience (which will be quality assured).
- Undertake regular school effectiveness reviews led by the Chief School Effectiveness Officer, with the school's improvement advisor, headteacher and chair of governors invited to attend. These meetings will be minuted and the minutes shared with the Local Academy Board by the chair;
- Hold termly Curriculum Leaders' network meetings, facilitated by the Chief School Effectiveness Officer. This will be supported through curriculum groups within each hub in order to support the development of the curriculum.

- k. Moderation of EYFS, literacy and numeracy will take place in hubs – facilitated by one of the Teaching and Learning Consultants and experienced members of staff sourced from within the schools or an out-sourced professional.
- l. Utilise peer-to-peer reviews; and
- m. Examine the potential to establish a Teaching School Alliance led by one of our schools.

In order to improve attendance and persistent absence in all our schools we will:

- Ensure attendance in our schools and persistent absence are reviewed termly by the executive and the School Effectiveness Committee of BDMAT.
- Request that headteachers include termly attendance and persistent absence data in their termly reports to LAB. These reports will include analysis by groups and be submitted to the executive as well as LABs;
- Use experienced, effective pastoral / attendance leads to support in schools where attendance is below national averages; and
- Work with local authorities to support in improving attendance where attendance is below national. Individual headteachers will have the delegated power to decide if the issuing of fixed-penalty notice / prosecution for poor attendance is an appropriate next step (liaising with the local authority)
- KPIs will be established that measures progress to ensure that all our schools have attendance at least in line with that seen nationally and persistent absence that is at or below the national figure.

Further development of the school improvement service of BDMAT

Over the course of the five years of this strategic plan it is proposed that the services we provide schools will expand. Some of this will be met through central management resource as a result of more schools joining BDMAT, whilst other services will be provided through the pooling of existing school finances in order to provide a more effective, bespoke service. The proposals are set out below:

A summary of the proposed development of the school improvement service is given below:

	2019/20	2020/21	2021/22 (for each hub)	2022/23	2023/24
SEND	SEND reviews – external	<p>Consistent Educational psychologist across each hub (supplied by LA)</p> <p>Internal reviews undertaken by SENCOs</p>	<p>Consider one Ed Psych across the MAT (employed by BDMAT)</p> <p>Speech and Language Expert</p> <p>Mental health worker in each hub</p> <p>Autism specialist in each hub</p> <p>SEND Consultant for each hub through pooling of existing school resources</p>	Specialist teachers for each hub for SEND pupils to work in classes	<p>Embedding good practice across the hubs</p> <p>Ensuring sustainability</p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Pupil Premium and Sports premium</p>	<p>Pupil Premium reports reviewed externally</p> <p>Schools having good impact identified – share good practice</p> <p>Sports competitions (Hub)</p>	<p>Leaders trained in undertaking Pupil Premium Reviews</p> <p>All Pupil Premium accessing variety of enrichment activities to include music, sports, arts etc</p> <p>Clear evidence of impact from targeted interventions on pupil attainment</p> <p>Centrally employed Sports leaders (funded by combining Sports premium) who will:</p> <ul style="list-style-type: none"> • Provide CPD for all teachers • Set up Sports Competitions/Leagues across hubs 	<p>Pupil Premium Champions that will support leaders to:</p> <ul style="list-style-type: none"> • Review and submit documentation • Track and monitor Pupil Premium pupils to ensure that gaps are closing • Ensure that all Pupil Premium are accessing enrichment activities – involved in competition, concerts, productions across hub and wider locality <p>MAT leagues organised</p> <p>MAT Olympics</p> <p>MAT swimming galas</p>	<p>Embedding of previous</p> <p>Consider ways/possibilities to combine Pupil Premium funding for greater impact and for more effective use</p> <p>Hub SLE's for PE</p>	<p>School SLE's for PE</p>
---	--	---	---	--	----------------------------

		<ul style="list-style-type: none"> • Ensure that there is a breadth of sporting activities that excite and engage all pupils • Review and submit Sports premium documentation 			
Teaching and Learning	<p>Consultant for EYFS and KS1</p> <p>Consultant for KS2 MAT wide</p> <p>Executive Leader centrally employed</p>	<p>2 X Consultant for EYFS/KS1</p> <p>2 X Consultant for KS2</p> <p>Investigate combining of school CPD budgets</p> <p>Executive leader</p> <p>Head of School Improvement</p>	<p>EYFS/KS1 Consultant for each hub</p> <p>KS2 Consultant for each hub</p> <p>Collaborative CPD (where appropriate)</p> <p>Head of School Improvement to lead each hub that will support CSEO by:</p> <ul style="list-style-type: none"> • Reviewing SES and other documentation • Ensure that all schools have broad and balanced curriculum • Review data and target setting for each school • Report half termly to the CSEO 	SLE's for literacy and numeracy	SLE's for non-core subjects

Systems and processes	Perspective online tool purchased	Perspective embedded			
	FFT tracking purchased	FFT tracking and Aspire embedded			
	Schools using both to support school improvement	Data collections refined and embedded			

BDMAT is acutely conscious that the MAT's success and effectiveness is predicated on there being effective leaders in place at all levels, including:

- BDMAT directors
- Local Academy Board governors
- The executive
- Headteachers
- Deputy and Assistant Headteachers
- Middle leaders

Our strategy for ensuring these groups provide effective leadership is as follows:

BDMAT directors

Directors will be chosen for their skills and representation. As a result, our board will consist of highly skilled individuals from a variety of professional backgrounds, including education and business. We seek to appoint directors from the Christian faith, other faiths and those with no faith. We ensure where possible our board is representative in terms of BAME and gender representation. An annual audit of director skills and training needs will be undertaken by the chair of the board. Training will be incorporated into board meetings where required and there will be annual director / chair of LAB development time set aside.

The board is a member of the National Governors' Association to help strengthen its processes.

In addition, in order to keep directors abreast of school contexts, directors will be issued with a list of appropriate opportunities for visits to schools to meet governors and staff through attendance at meetings, in addition to at least one annual visit to see the school in the working day. Directors will produce reports of their visits to ensure that all directors are aware. Directors will be linked to a school in order to learn about how schools operate within an area. Directors will be invited to be members of the recruitment panel for all headteacher appointments.

Local Academy Boards

The executive and BDMAT board acknowledge the huge contribution Local Academy Boards make in developing our schools. The roles of LAB governors are clearly set-out in the handbook for governors, this includes termly roles to be undertaken by the LAB. In order to ensure board directors can play a full and effective role we hold the following:

- Termly chairs of LAB Network meetings attended by the executive;
- Annual opportunities for governors to meet and work with directors;
- Workshops at the Church of England, Birmingham annual governor conference; and
- Annual hub governor evenings led by the executive.

In the spring 2020 the executive plan to recruit a School Support Officer to oversee the work of LABs and to provide effective communication is in place between the board, LABs, executive and headteachers. The School Support Officer will:

- Produce half-termly model agendas for LABs.
- Produce termly headteacher report templates and quality assure the reports produced by headteachers before they are submitted to LABs

- Liaise with clerk to governors and line manage them to ensure they are effective in their roles.
- Check through minutes of all LABs and report on these to the executive – highlighting good practice and areas where further support may be needed.
- Undertake training for clerks and LABs.

As stated earlier in this strategy, the executive has the power to suspend the Local Academy Board where it is felt they are ineffective at supporting and challenging school leaders; such a situation will always be rare and the board of directors and executive would always prefer to have a representative local academy board in place.

The executive

The CEO completed the national MAT Chief Executive training led jointly by the Church of England Central Officer, Deloitte and University College London in 2018. Subsequently, the Chief School Effectiveness Officer (CSEO) and CEO have become members of the Church of England MAT Network which holds termly meetings; in addition, there is a national conference that they attend. The CEO is a member of the Birmingham Education Partnership CEO network and the CEO consultative group for the National Association of Headteachers. The CSEO is part of BEP strategic planning group and chairs the Oaks Collegiate. The Chief Finance and Operations Officer attends termly updates for finance directors from a national auditing firm and is a member of his professional accounting association.

These networks will be maintained going forward and others fostered in order to ensure that the executive are effective in their roles.

Headteachers

We will continue to support our headteachers through half-termly network meetings and an annual residential conference. In addition, headteachers are also invited to the Church of England, Birmingham diocesan conference.

New heads are offered an induction programme. A mentor is provided from within the MAT and in addition from the Diocese if needed, as well as regular support from either the CEO, CSEO or the Executive Leader. Where additional support is required then a comprehensive package will be provided based on the needs of the individual. Head's network meetings and hub meetings allow for collaborative working whilst ensuring that heads do not become isolated; this has been particularly welcomed by those new to role.

Deputy and Assistant Headteachers

Half-termly meetings are in place for deputy headteachers facilitated jointly by the CSEO and the Deputy Director of Education for the Church of England, Birmingham. Although the focus of the meetings is determined by the group, it concentrates on all aspects of leadership and in 2019 - 2020 will include training on being a leader in a Church School.

In addition, from 2019 / 20 we will introduce a new residential conference for the deputies.

Middle leaders

As part of our succession and sustainability planning, we realise that the MAT needs to nurture the prospective leaders of the future. To encourage teachers into leadership we will run several CPD sessions throughout the year for those wanting to move towards a more strategic role. With the

Education Inspection Framework in mind we will offer not only a refresher course to those middle leaders who have some experience of leading a subject area but also, in partnership with the Diocesan Board of Education, a course aimed at those who are new to subject leadership. This combined with the offer of bespoke training for individual schools will ensure that all teachers are given opportunities to grow as leaders. We will develop Senior Leaders in Education across each hub to provide peer-to-peer support.

Vision:

To provide sector leading services that ensure the sustainability and long-term development of the trust and its schools so that current and future generations of children and staff have the best possible environment to work in and achieve their potential.

Overall Strategy:

Centrally manage and coordinate, with the help of external experts where appropriate, support services for the trust's schools so that headteachers and school leaders can focus on teaching, learning and implementing the trust's vision and ethos.

This will provide consistency of experience, whilst ensuring that headteachers are able to maximise the time they spend on their area of expertise.

When complete, this will result in better value for money across the trust and its schools and will provide a tangible incentive for future schools to join the trust, should Directors decide that further expansion is desirable. The strategy will enable easy implementation for new schools joining the trust and will be designed to scale with any future growth.

The opening of the trust's first secondary school in September 2021 will provide a step change for the trust and this is being considered for all areas of central services so that the trust is able to transition seamlessly into operating a growing secondary school.

At all times services will work with school leaders to ensure that the provision reflects the uniqueness of the school and its community as much as possible.

BDMAT services will ultimately cover the following 9 areas. These services will develop at different rates over the next 3 years reflecting capacity and the requirements of the trust. Once the initial three years of this plan is concluded the trust will have an established a central service offer which will be embedded over the following two years through to August 2024. During this period a full review will be carried out to assess whether the models and approaches taken are still delivering best value and remain fit for purpose in light of the evolution of the trust and its future plans.

The central function for finance and services will be led by the Chief Finance and Operations Officer (CFOO).

A summary of the proposed development of services is given below:

	2018/19 (12 schools)	2019/20 (16 schools)	2020/21 (17 schools)	2021/22 (18 schools – secondary Opens)
Finance	CFOO 2 x School Finance Partner 1 x Finance Assistant (Apprentice)	CFOO 1 x Head of Finance 2 x School Finance Partner 1 x Finance Assistant (Apprentice)	CFOO 1 x Head of Finance 2 x School Finance Partner 1 x Finance Assistant 1 x Finance Assistant (Apprentice) 1 x Head of Operations	CFOO 1 x Head of Finance 3 x School Finance Partner 2 x Finance Assistant 1 x Head of Operations
HR & Payroll	Outsourced Services	Outsourced Services Recruitment of HR Officer/Manager for 2020/21 Harmonisation work undertaken Trust becomes a Real Living Wage employer Common Review and Development platform introduced	In house HR service In house Payroll service Centralised recruitment process All new staff on harmonised terms	Harmonisation is complete Trust obtains external recognition as a good employer
Income	School level income generation	Refurbishment and central letting of all vacant caretaker houses Benchmark and tender solutions for central management of income generation activities for 2020/21	Central management of all out of hours activities and income generation	Ongoing central management and monitoring of income generation performance

	2018/19 (12 schools)	2019/20 (16 schools)	2020/21 (17 schools)	2021/22 (18 schools – secondary Opens)
Estates	Services managed at school level	<p>Central coordination of estates compliance activity</p> <p>Development of ongoing capital plan with the assistance of external experts</p> <p>Centralisation of all capital funding across the Trust in order to deliver capital plans</p> <p>Review of site team experience and skills along with upskilling work</p>	<p>Central management of all estates and cleaning teams</p> <p>Cleaning teams directly managed by the site manager</p> <p>Annual review of capital plan</p>	<p>Central management of all estates and cleaning teams</p> <p>Cleaning teams directly managed by the site manager</p> <p>Annual review of capital plan</p>

	2018/19 (12 schools)	2019/20 (16 schools)	2020/21 (17 schools)	2021/22 (18 schools – secondary Opens)
ICT	Services managed at school level	<p>Obtain full record of ICT equipment, infrastructure, software and services used at all trust schools</p> <p>Recruit Head of ICT for 2020/21</p> <p>Develop ICT Strategy for the Trust</p> <p>Development of ongoing capital plan with assistance of external experts</p> <p>Common School Development Plan platform introduced</p>	<p>Establishment of inter-Trust connectivity</p> <p>Common MIS and launch shared platform for teachers</p> <p>IT technical support all provided by BDMAT including electronic helpdesk</p> <p>Annual review of ICT capital plan</p> <p>Centralised ICT purchasing</p> <p>Recruitment of ICT technicians:</p> <ul style="list-style-type: none"> • 1 x Senior ICT technician • 1 x ICT technician • 1 x ICT technician (Apprentice) 	<p>Shared email addresses</p> <p>One website provider with unified online identity for the Trust and its schools</p> <p>Annual review of ICT capital plan</p> <p>Centralised ICT purchasing</p> <p>Ongoing standardisation of software and services usage</p>
Catering	Outsourced catering at majority of schools	<p>Obtain full catering data from all Trust schools</p> <p>Review staff transfer implications with the trust's solicitors</p> <p>Benchmark and tender solutions for Trust wide catering from 2020/21</p>	Centrally managed trust wide catering solution for all schools	<p>Ongoing central management and monitoring of catering performance</p> <p>Full review of catering provision at the end of 2022/23</p>

	2018/19 (12 schools)	2019/20 (16 schools)	2020/21 (17 schools)	2021/22 (18 schools – secondary Opens)
Purchasing	School level procurement	<p>Collate details of all service agreements and contracts in place at schools</p> <p>Central tendering completed for:</p> <ul style="list-style-type: none"> • Broadband • Utilities • Printing/Copying • Classroom resources/stationery 	<p>Ongoing central tendering of contracts and services</p> <p>Establishment of approved suppliers listing</p>	<p>All contracts and service agreements centrally managed</p> <p>Centralised ordering in place</p>
Risk Management	School level risk management	<p>Introduction of Evolve Educational Visits platform</p> <p>Introduction of Evolve Accident Book</p> <p>Trust wide risk management policy introduced</p> <p>Risk based Committee meeting agendas</p>		

	2018/19 (12 schools)	2019/20 (16 schools)	2020/21 (17 schools)	2021/22 (18 schools – secondary Opens)
Governance	School led Local Academy Boards with central oversight	Governors and Directors forum established New LAB Terms of Reference in place Template Headteachers report and meeting agendas in place Ongoing Governor training provided centrally	Centrally managed secure Governors portal in place for all schools Centrally managed clerking for all LABs Ongoing Governor induction and training	Ongoing Governor induction and training

1. Finance:

Service:

- Finance support will be provided to schools by a central team of School Finance Partners, overseen by a Head of Finance and the CFOO.
- A standard management accounts template will be introduced across the Trust and its schools from September 2019. This will ensure consistency and transparency at all levels of the organisation.
- The trust operates a single balance sheet, with a central bank account.
- Payments will be administered by the central team and by 2020/21 all invoices will be processed by the central team.
- The trust operates a single finance system, ordering system and a single budgeting system.
- ParentPay or similar system will be introduced in 2019/20 to reduce and ultimately eliminate the need for cash to be handled within schools.
- From 2020/21 school administration teams will only be required to deal with pupil based financial transactions e.g. trip contributions, and processing orders through the finance system.
- School administration teams will be led by an Officer Manager and will be staffed on the basis of the administration needs of the school, with services provided by BDMAT excluded from the administration teams' responsibilities.

Reserves:

- In 2019/20 the trust will revisit its published reserves policy, agreed by Directors, which will be reviewed annually to ensure the ongoing sustainability of the trust and its individual schools.
- The reserves policy will include expectations for reserve levels across the trust including a working capital reserve (based on a percentage of annual pay costs), an allowance for covering future restructuring costs, and a requirement for ongoing capital investment (relating to both estates and ICT).
- From 2020/21 schools will be expected to budget, and achieve, a surplus (based on a percentage of central government funding set by Directors), to support the ongoing capital investment at the school and across the trust.
- Where schools are unable to meet the requirements, a recovery plan will be put in place.
- During 2019/20 an investment plan will be put in place to invest the trust's reserves.

2. Payroll & HR:

Service:

- Current payroll and HR services are provided by EPM, an external company. Ad hoc legal advice is provided by Anthony Collins Solicitors on agreed hourly rates.
- The trust will look to provide an in-house HR service from September 2020. This will be designed to reduce the ongoing cost to the trust whilst increasing the level of service received by the schools. A HR Officer will be appointed supported by a fixed price HR advice contract with a legal firm.
- Over time the trust's HR service will administer and coordinate all recruitment activities across the trust in order to control risk to the trust and leverage the value of the trust in recruiting staff.

- Investment in a dedicated HR system will be required, this will be selected to ensure that any future payroll provision can be supported using the same system.
- The costs of external payroll provision will be monitored to ensure that this remains the best value for money option for the trust. Where in-house provision will provide a better value for money option this will be introduced across the trust.
- A self-service portal, with in-built approval mechanism, will be introduced to allow all staff to process over-time claims, expenses, and access payslips.
- A standardised set of job descriptions covering all roles within the trust will be introduced for all new staff from April 2020.

Harmonisation:

- The harmonisation of all staff terms and conditions will conclude in April 2022.
- The agreed harmonised terms, conditions and contracts will be in place prior to recruitment for the Christ Church secondary staff. Once in place all new staff across the trust will join on the harmonised terms, conditions and contracts. This is designed to minimise staff affected in April 2022 and ensure transparency of recruitment during this interim period.
- Anthony Collins Solicitors are preparing a harmonisation timeline and will support the trust in this process.
- Harmonisation will include agreeing a trust wide framework for the use of the national local government pay rates within schools in consultation with recognised professional associations and unions.

2019/20	2020/21	2021/22
<p>Consultation with stakeholders and agreement of harmonised terms, conditions and contract by Directors.</p> <p>Use of agreed terms for all new starters within the trust and its schools.</p> <p>Notification to all staff of changes to terms, conditions, and contracts in April 2022.</p>	<p>Use of agreed terms for all new starters within the trust and its schools.</p>	<p>All staff remaining on TUPE terms, conditions and contracts transfer to BDMAT terms, conditions and contracts.</p>

Real Living Wage:

- The trust wishes to become a Real Living Wage employer. The current Real Living Wage has been calculated as £9/hr by the Living Wage Foundation compared to the National Living Wage of £8.21/hr for over 25s.
- All staff on local government pay rates earn a minimum of £9 (where their FTE hours are 37 or less). However, the trust also has a number of staff under 25 or who transferred on different pay rates.
- All staff over 25 will be paid the Real Living Wage by 1 January 2020
- All staff under 25 will be paid the Real Living Wage by 1 April 2020 (with the exception of school-based apprentices).
- The trust will then pursue accreditation with the Living Wage Foundation for September 2020. This will require the trust to have a mechanism for encouraging service providers and other suppliers to pay the Real Living Wage.

- The trust will also review hours of its part time staff during 2019/20. The Living Wage Foundation recommends 16 hours a week as the Living Hours to go along with the Real Living Wage, unless an employee requests otherwise.
- The challenge of maintaining the differential between different staff levels will be addressed as part of the harmonisation process.

Recruitment & Retention Strategy:

- As part of the harmonisation process the trust will review its benefits package and make recommendations on the addition of any benefits to improve the recruitment and retention of staff within the trust, this will include considering a medical cash plan, retail discount scheme, private medical insurance and cycle to work scheme. Once agreed, a standard information pack will be produced that can be issued to all new staff.
- Following the appointment of in-house HR provision, a full recruitment and retention strategy will be produced by the trust Executive, incorporating the leadership development strategy.
- The Board of Directors will be updated on succession planning on an annual basis.
- Recruitment will be co-ordinated by the HR team to ensure that the best talent can be recruited and retained within the trust for as long as possible and to ensure the strategic deployment of our employees, whilst minimising recruitment costs.
- A central web portal for applicants to view all jobs across the trust will be established in 2020. This portal will allow direct applications to the trust by the end of 2021.
- The trust will pursue national accreditation as an employer in 2022 for example Investors in People, or The Times Best Companies to work for Award.
- As part of the strategy the trust will increase its social media and internet presence as an employer for example through LinkedIn and Glassdoor.

Pensions:

- The trust is required by its funding agreement to offer the TPS (Teacher Pension Scheme) to all teaching members of staff and the LGPS (Local Government Pension Scheme) to all non-teaching members of staff. Both schemes function as defined benefit CARE (Career Average Revalued Earnings) schemes.
- As of April 2019, the trust has a single TPS registration eliminating the need for the trust to complete (and have audited) individual school End of Year Certificate (EOYC) returns. The contribution rates for this scheme are all set nationally.
- The LGPS is a national scheme administered locally by a number of local authority pension funds. The trust has schools within the West Midlands Pension Fund (WMPF) and the Warwickshire Pension Fund. Each school currently has their own fund and employer contribution rates.
- During 2019/20 the trust will explore the costs of combining the schools into one entity within the WMPF fund and the Warwickshire Pension Fund. This should reduce the overall employer payments required to the two schemes.
- If successful in the above consolidation, during 2020/21 the trust will then explore the possibility of transferring the Warwickshire Pension Fund schools into the WMPF so that the trust is then able to operate a single LGPS fund.

3. Income Generation:

Lettings:

- During 2019/20 the trust will undertake to refurbish most vacant caretaker houses located at trust schools that can be isolated from the school premises. Once complete the trust will appoint a residential letting agent to secure tenancies for the houses.
- As caretakers' houses become vacant they will be refurbished, where necessary, and added to the letting agent portfolio.

- Hiring of trust facilities will become the responsibility of the central team during 2020/21 in preparation for the opening of Christ Church secondary academy, this will include the use of excess capacity during the day for example where a 1 form entry school occupies 2 form entry buildings.
- Facilities would become the responsibility of the central services team 1 hour after the official end of the school day. Use of facilities after this time by the school will need to be agreed with the central team.
- It is estimated that the secondary school will be able to generate circa £120,000 gross income per year once established from lettings.
- Profits from the income generation activities would sit within the trust reserves for allocation to capital projects.
- A tender exercise for non-residential lettings services within the trust will be carried out during 2019/20 ready for 2020/21. Tenders will be benchmarked against an in-house provision. The solution offering the best overall value for money would be selected for the next 3 years, at which point a review would be undertaken.

Grant Funding:

- The central team will support school leaders in writing any grant funding applications as required.
- It is the desire of the trust to ultimately have the capacity to regularly identify and bid for additional grant funding from outside of the DfE, however this is not expected to occur during the period covered by this strategy paper.

4. Estates:

Service:

- During 2019/20 the trust will transition to a centrally managed estates service with all schools moving to having a Site Manager on a full year contract. This will allow for in-house maintenance and works to complement external suppliers refurbishment works as part of a capital strategy.
- A training and development programme will be put in place for the estates teams.
- The costs of the estates service will be outside of the current top slice but will transfer the existing costs within the schools to a central budget, along with the estates staff. This will enable the enhancement of services and will lead to cost savings for the trust once fully implemented.
- Basic maintenance work will be completed on site by site managers and the team will work together within the local hubs to deliver on larger projects, particularly where these do not require specialist external support.
- The same principles will be introduced to the new Christ Church secondary school to ensure that it remains in the condition on opening day throughout its life.

Health & Safety:

- From 2019/20 an external provider will be appointed as the Responsible Person, this role is a requirement under HSE Regulations.
- Central compliance monitoring system will be put in place for 2019/20 which will oversee the completion of required periodic checking and maintenance of the school sites. This will be supported by the external provider of Responsible Person services.
- Trust wide agreements will be put in place for 2019/20 to ensure all externally conducted compliance checks are carried out in a timely and appropriately skilled manner.
- A trust-wide system for risk assessments will be introduced by 2020/21.
- All Site Managers will undertake IOSH Managing Safely course during 2019/20.
- Fire alarm, intruder alarm, and CCTV systems will be surveyed during 2019/20, any gaps will be compiled with remedial action scheduled to ensure systems meet the current standards and coverage.

- Key holders and site access arrangements will be reviewed for all schools in 2019/20 to ensure that only current employees of the trust have access to the site.
- Where necessary schools will be fitted with new locks. The trust will have a centrally held set of keys for all schools.
- Health and Safety data will be presented to each Finance & Resources Committee and each LAB meeting.

Estates maintenance and development including capital funding:

- All capital funding will be held centrally from 2019/20.
- An ongoing capital plan will be developed during 2019/20, with the help of external experts, covering all properties within the trust, this will be reviewed and updated each year.
- Capital funding with a contingency will be agreed with Directors each year made up of central government funding (DFC, SCA etc), reserves, donations and specific grants.
- Capital programme will include a mechanism for both input from school leaders and for specific bids for innovative projects that will enhance learning and educational development.
- All maintenance budgets will be managed centrally. Site Managers deployed at the schools will be the budget holders with work programmes agreed centrally.
- Site Managers will be trained to increase the amount of works that can be done in-house.
- The trust will look to exploit energy saving interest free loans where possible to update facilities and reduce long term running costs of its estates.
- Utility usage will be monitored to identify opportunities for usage savings and to spot problems on sites.

Cleaning:

- Cleaning will be managed in-house by the Site Managers deployed at each site.
- Cleaning staff will be part of the estate teams.

5. ICT:

Service:

- ICT support will be provided by a central team. Recruitment for a Head of ICT will take place during 2019/20 to replace the current support contracts that exist within the schools for 2020/21.
- As with the estates service the costs of the centralised ICT service will be additional to the current top slice for central services however the cost will replace the costs already being incurred by the schools. By centralising the service and the staffing, savings will be made which will enable the enhancement of services and ultimately cost savings for the schools.
- The Head of ICT role will be supported by ICT technicians as the Christ Church secondary school reaches opening.
- The trust will designate a trust wide lead for GDPR to support the registered DPO (Data Protection Officer) and promote the safeguarding of data throughout the trust and support in ensuring that data protection is considered as the trust develops its ICT offerings.

Infrastructure:

- BDMAT will establish a common operating platform across the Trust utilising cloud based services where these provide the most sustainable and value for money solutions.
- Software and services in use by schools will be harmonised over the next 3 years starting with a common MIS system from 2020/21 at the same time a platform will be

introduced to allow collaboration and sharing of resources across all of the schools within the trust. This will draw on technology in use within the commercial sectors where collaboration between geographically separate locations is essential.

- Key systems will therefore be accessible by the central team to reduce request for information from school staff. An online School Development Plan / SES platform is being introduced in 2019/20 at the first part of this.
- From 2021/22 all staff will use a common email address and the trust will have appointed a common website provider to increase the trust's web identity which will complement the trust's pupil and staff recruitment plans.
- During 2019/20 work will be undertaken to identify all ICT equipment, infrastructure, services and software in use across the trust. This will feed into an ICT Strategy for the trust.
- The ICT Strategy will then lead to the development of an ICT capital plan which will be delivered in conjunction with the Estates capital plan each year to ensure the sustainability of all services.
- From 2019/20 all ICT purchases will be coordinated centrally and will need to be part of the ICT plans.
- The trust will aim to balance early adoption of emergent educational technology that will enhance learning and attainment opportunities with the need for sustainability, this will be explored further in the full ICT Strategy. It is likely that, where possible, the trust will position itself to be a second wave adopter of new technology.

6. Procurement:

Services/Utilities:

- Contract and service tendering will be led via the central services team.
- A list of all contract and services agreements in place across the trust will be compiled by the end of 2019 / 2020. This listing will provide the basis for prioritising tendering activity over the next 3 years.
- A schedule of tendering activity will be provided to schools each year. Schools will be responsible for managing their existing agreements until tendering takes place, any contract renewals during the transition period should be for a maximum of 12 months unless agreed with the CFOO.
- Once completed, contracts and service agreements will apply to all trust schools from the earliest end date for existing services. These agreements will then apply to all new schools joining the trust and any new schools that the trust opens.
- External advice will be sought where required at the discretion of the CFOO.
- Initial priorities during 2019/20 are expected to include photocopying/printing, broadband connectivity, health and safety compliance services, utilities and catering services.
- The trust will consider any Government schemes and arrangements that exist for services and contracts where these provide the best value solution for the trust, however this will not be assumed.

Suppliers:

- The trust will maintain an approved supplier list.
- New suppliers will only be added where a demonstrable case for providing a new service or improved value for money can be made.
- The approved suppliers list will be reviewed on a regular basis by the central team.
- Where possible preference will be given to suppliers able to demonstrate ethical operating practices e.g. payment of the Real Living Wage.
- In addition, we will aim to support suppliers local to our schools

7. Catering:

- Catering has a budgeted net cost of over (£250,000) to the trust in 2019/20. The schools with in-house catering provision show break-even positions. Catering provision should have a net zero impact on the trust.
- A catering profit and loss account will be included in management accounts for 2019/20 to discern the accuracy of this information and form the basis of decision making on the preferred solution for 2020/21 and beyond.
- During the first half of 2019/20 the trust will work with its solicitors to understand the TUPE implications of any changes to catering provision for 2020/21. Where this would be a transfer of staff from Birmingham City Council the risks associated with outstanding equal pay claims will be explored and where possible quantified.
- If the risk is deemed to be manageable a tender exercise for catering within all schools within the trust will be carried out, supported by an external expert to ensure compliance with OJEU requirements. Tenders will be benchmarked against in-house provision with specialist catering support. The solution offering the best overall value for money will be selected for the next 3 years, at which point a review would be undertaken.
- The trust's solution will apply to all new schools joining the trust at the point of transfer or in the case of Christ Church Secondary school the point of opening.
- The trust-wide catering solution will be managed through the central services team with schools inputting to the day to day provision e.g. menus and timings of service.
- The central services team will monitor the performance of the selected catering provision throughout the ensuing 3-year period.

8. Risk Management:

- The trust will introduce a new risk register format for 2019/20.
- All headteachers will be required to maintain a risk register for their school and report on it to each LAB meeting.
- The CFOO will review the school risk registers on a periodic basis and these will be a source of information to feed into a trust wide risk register.
- A strategic risk register will be maintained consisting of the highest risks within the trust risk register. These will be monitored by the Board of Directors at each directors' meeting.
- A Risk Management policy will be developed to provide clarity on responsibilities across the trust.
- Insurance will be provided to the trust via the Government's RPA (Risk Protection Arrangement) scheme, but we will continue to review to ensure it is the best option for our trust.
- Additional cover required outside of the scope of this scheme e.g. minibuss insurance will be arranged by the headteacher in liaison with the CFOO.
- During 2019/20 the trust will introduce the electronic Evolve system for school trips, this will ensure that all high risk and residential trips are reviewed by external advisor prior to the trip being approved.
- During 2019/20 the electronic Evolve Accident book system will be introduced to record all health and safety incidents and accidents within schools. A standard trust wide reporting template will report incident rates to all LAB and Finance and Resources meetings.
- A Critical Incident Management Plan will be developed during 2019/20.
- Risk management training will be provided to school leaders.

9. Governance:

- The Scheme of Delegation will undergo annual reviews to ensure clear separation of duties and responsibilities across the trust. This will include providing clear identity for Local Academy Boards (LABs).
- Following consultation with LAB chairs, clear Terms of Reference will be issued to LABs from September 2019.
- The CEO will work with Directors to ensure all schools have strong LABs that provide support and challenge to school leaders
- The trust operates a Finance & Resources Committee to oversee the non-educational aspects of the trust
- The trust operates a School Effectiveness Committee to oversee the educational performance of all of the trust's schools.
- Template headteacher reports and meeting agendas will be provided to all schools by the central team to support the work of LABs from 2019/20, the headteacher reports will include a section highlighting the key risks for the school and the measures in place to mitigate these risks.
- Central services will ensure that all governors have access to appropriate training to ensure they are able to discharge their responsibilities.
- By 2019/20 a secure online portal will exist for all governors to access meeting papers and other relevant information about their school.
- Overtime the trust will centralise the clerking service for LABs to ensure quality, consistency and value for money.

The directors and executive are aware that for our trust vision to be achieved we need highly effective staff at all levels in place within both the Central Team and each of our schools. This will therefore require an effective recruitment and training strategy to be established to ensure our vision and targets are achieved within the timescale of this plan. There are a number of aspects that have been covered in other sections of this plan that support this strategy.

This people strategy aims to summarise these aspects into a single plan.

Recruitment

We accept that recruiting to teaching posts can be very difficult in the current climate and therefore we need to have in place a recruitment and retention approach. We will examine the option of recruiting our teaching staff centrally by operating a 'pool' for potential teachers to apply to – this will be trialled in the spring term 2020 for appointments for September 2020. This pool would allow candidates to indicate which of our three hubs they would prefer to work in if appointed. Headteachers would be involved in the process and teachers would be placed according to school needs; headteachers would have the right to decline a member of staff if they felt they were not a suitable match for their needs.

We will also link with local universities to place high quality students into our schools – this will allow us to train staff and identify potential high calibre future staff. We will also work with universities and attend job fairs to attract potential staff. We will also explore the Teach First scheme to access staff.

If recruitment to posts other than teachers becomes a challenge, we will examine the possibility of centrally recruiting to these posts.

Retention

Retention is an important aspect of the work of the Central Team, as if we are able to retain our staff we will not need to recruit. We will therefore look to 'talent-spot' in order to identify high performing individuals who can fill vacancies in the trust. We will work with our Staff Forum, which meets termly, to discuss initiatives that would help to retain staff.

The executive will form and be an active member of a Joint Consultative Committee with the main staff unions and professional associations, ensuring that we keep our staff interests at the heart of our decisions.

During the period of this plan the executive will also examine:

- a. Private health schemes;
- b. Adopting a charity for all staff to support with team building activities based around supporting these charities;
- c. All school leaders and teachers will be offered a career profile interview to identify how they can be supported to develop their career whilst supporting BDMAT;
- d. Exit interviews will be introduced across the trust to ensure that leaders have a thorough knowledge of why staff leave the organisation;
- e. Introduce a staff intranet to communicate to staff and highlight good practice; and
- f. Introduce long-service recognitions for staff who have served at either their school or across BDMAT for 10, 15, 20 and 25 years.

Staff well-being

One of BDMAT's vision statements is 'positive wellbeing for all', this includes our staff as well as pupils. We will therefore ensure each school has staff employed to act as both first-aiders and mental health first-aiders. We will also plan to establish counselling for staff who require this in order to minimise ill health for staff and ensure staff absence remains low.

We will introduce a MAT wide counselling service that staff can access for either work or life related issues.

At times staff will have to deal with the tragic news that they have been given a diagnosis of terminal illness. In these circumstances we want to support staff in dealing with this outcome and treat them with dignity and respect; for some they will have a desire to remain employed. We have therefore signed-up to the TUC 'Dying to Work' charter.

Continuous Professional Development

Since the start of BDMAT the Central Team has built a strong CPD programme for our staff which has been highly regarded. Currently, this programme has centred predominately on teaching staff, admin leaders and teaching assistants, although CPD for other staff is undertaken in each of our schools. Going forward we want to ensure that staff at all levels have access to good CPD that helps them to be more effective in their roles.

We also want to explore establishing a rigorous, centrally delivered induction programme for new teaching and learning support staff which sets out our expectations for delivery of highly effective teaching. Similarly, a programme for wider support staff, particularly service leaders (Office Managers, Site Managers, Catering Managers) will also be explored.

Section 10 – Key Performance Indicators (KPIs)

Strategic aims	KPIs	Measure	2024 target	Confidence level
Strategic aim 1: Education is led by BDMAT's vision and values, and for our Church of England schools these are embedded within a Christian ethos: Owner: Chief Executive Officer. Committee: School Effectiveness	1.1: percentage of parents showing high satisfaction from annual parent satisfaction survey	External electronic questionnaire completed spring term annually – parent data submitted directly to BDMAT	95% of parents would recommend the BDMAT school to friends and family	90% or above
	1.2: Number of schools who meet BDMAT's Christian distinctiveness / ethos annual checks	Annual Christian Distinctiveness audit by BDMAT	100% of schools meet to audit check successfully	None
	1.3: External assessment	5-year SIAMS inspection	100% of schools good or better at SIAMS inspection	None
	1.4: Internal assessment (predicted SIAMS judgement)	Annual SIAMS internal assessment via Christian Distinctiveness audit by BDMAT	100% of schools on track to gain good or better at their next SIAMS inspection	None
Strategic aim 2: To work in partnership with parents and carers to promote pupils' social, moral, spiritual, cultural and	Primary indicator 2.1: Pupil cultural capital entitlement	Annual audit by BDMAT to examine the implementation of the school's cultural capital charter	100% of schools have a cultural capital charter that is being met	None

Strategic aims	KPIs	Measure	2024 target	Confidence level
physical development within happy and caring environments: Owner: Chief School Effectiveness Officer Committee: School Effectiveness				
	Secondary indicators	External electronic questionnaire completed spring term annually – parent data submitted directly to BDMAT	95% of parents would recommend the BDMAT school to friends and family	90% or above
	1.1: percentage of parents showing high satisfaction from annual parent satisfaction survey			
	1.2: Number of schools who meet BDMAT's Christian distinctiveness / ethos annual checks	Annual Christian Distinctiveness audit by BDMAT	100% of schools meet to audit check successfully	None
	1.3: External assessment (SIAMS)	5-year SIAMS inspection	100% of schools good or better at SIAMS inspection	None
	1.4: Internal assessment (predicted SIAMS judgement)	Annual SIAMS internal assessment via Christian Distinctiveness audit by BDMAT	100% of schools on track to gain good or better at their next SIAMS inspection	None
Strategic aim 3: Every school provides a broad and balanced curriculum that equips all pupils to thrive, achieve their goals, succeed in later life and	Primary indicator 3.1: SIA Judgement on quality of curriculum	BDMAT's termly review of quality of education	100% of schools have a SIA judgement of good or better	None

Strategic aims	KPIs	Measure	2024 target	Confidence level
contribute to a diverse society and respect the environment: Owner: Chief School Effectiveness Officer Committee: School Effectiveness	Secondary indicators 2.1: Pupil cultural capital entitlement	Annual audit by BDMAT to examine the implementation of the school's cultural capital charter	100% of schools have a cultural capital charter that is being met	None
	7.1: External assessment (Ofsted)	Section 8 or Section 5 Ofsted inspection result (between 2-5 year cycle)	100% of schools good or better at Ofsted inspection	None
	7.2: Internal assessment (predicted Ofsted judgement)	BDMAT's termly review of predicted Ofsted grade	100% of schools have a SIA judgement of good or better	None
Strategic aim 4: Pupils are provided with effective pastoral support and safeguarding arrangements meet all national and local requirements: Owner: Chief Executive Officer Committee: Full board	4.1: Pupil attendance	Current overall school attendance of pupils of compulsory school age	At or above national (currently 96% in primary)	Within 0.5 percentage point of that seen nationally
	4.2: Pupil persistent absence rates	Current persistent absence of pupils of compulsory school age	At or below national (currently 8.7% in primary)	Within 0.5 percentage point of that seen nationally
	4.3: Number of safeguarding Incidents leading to Serious Case Reviews	LADO instigated serious case reviews involving pupils / staff at the school	No pupils or staff being investigated	None
	4.4: Number of schools with high (red) risk recommendations in their latest BDMAT safeguarding audit	Annual BDMAT safeguarding review undertaken by the School Support Officer	No schools have red recommendations identified	None

Strategic aims	KPIs	Measure	2024 target	Confidence level
Strategic aim 5: Our schools are at the heart of the communities that they serve, collaborating with the church, other schools, stakeholders and organisations in the area to best support their community: Owner: Chief Executive Officer Committee: School Effectiveness	5.1: Schools are active members of their local communities	Annual Christian distinctiveness / ethos reviews identify that our church schools are active members of the parish and that all schools can demonstrate a commitment to their community and local schools	100% of schools are judged to be active members of their community	None
Strategic aim 6: Working in partnership with parents and carers we promote pupils' intellectual development as evidenced through external and internal indicators that demonstrate the vast majority of pupils make good or better progress in our schools and as a result, attainment is high in all of our schools or improving rapidly: Owner: Chief School Effectiveness Officer Committee: School Effectiveness	6.1: Early Years attainment	Percentage of pupils achieving a Good Level of Development (GLD) at the end of Reception	100% of schools have attainment in or around the national GLD (72% in 2019)	Within 2 percentage points of that achieved nationally (70% in 2019)
	6.2: Y1 phonics	Percentage of pupils achieving the phonics screening at the end of Y1	100% of schools have attainment in or around the national (82% in 2019)	Within 2 percentage points of that achieved nationally (80% in 2019)
	6.3: KS1 attainment	Percentage of pupils achieving combined reading, writing and maths at the end of Y2	100% of schools have combined attainment in or around the national combined at end of KS1 (65% in 2019)	Within 2 percentage points of that achieved nationally (63% in 2019)
	6.4: KS2 combined attainment (school level) 3-year average	Percentage of pupils achieving combined reading, writing and	100% of schools have combined attainment in or around the	Within 2 percentage points of that achieved

Strategic aims	KPIs	Measure	2024 target	Confidence level
		maths at the end of Y6 via 3-year average (ASP)	national combined at end of KS2 (63.52% in 2019)	nationally (61.52% in 2019)
	6.5: The percentage of combined pupils across the trust at ARE at the end of KS2	Percentage of pupils achieving combined reading, writing and maths at the end of Y6	The combined % of pupils at ARE across the trust is at or around national (65% in 2019)	Within 2 percentage points of that achieved nationally (63% in 2019)
	6.6: Y6 reading attainment	IDSR quintile of pupils achieving Y6 SATs reading attainment	100% of schools have attainment in the 2 nd or 1 st quintile	In the 3 rd quintile or above
	6.7: Y6 writing attainment	IDSR quintile of pupils achieving Y6 SATs writing attainment	100% of schools have attainment in the 2 nd or 1 st quintile	In the 3 rd quintile or above
	6.8: Y6 maths attainment	IDSR quintile of pupils achieving Y6 SATs maths attainment	100% of schools have attainment in the 2 nd or 1 st quintile	In the 3 rd quintile or above
	6.9: Y6 reading attainment (disadvantaged)	Percentage of disadvantaged pupils achieving Y6 SATs reading attainment	100% of schools have attainment in or around the national (73% in 2019)	Within 2 percentage points of that achieved nationally (71% in 2019)
	6.10 Y6 writing attainment (disadvantaged)	Percentage of disadvantaged pupils achieving Y6 teacher assessment in writing	100% of schools have attainment in or around the national (78% in 2019)	Within 2 percentage points of that achieved nationally (76% in 2019)

Strategic aims	KPIs	Measure	2024 target	Confidence level
	6.11: Y6 maths attainment (disadvantaged)	Percentage of disadvantaged pupils achieving Y6 SATs maths attainment	100% of schools have attainment in or around the national (79% in 2019)	Within 2 percentage points of that achieved nationally (77% in 2019)
	6.12: Y6 reading progress	APS progress measure for previous year	All schools have progress in the confidence range 'average'	None
	6.13: Y6 writing progress	APS progress measure for previous year	All schools have progress in the confidence range 'average'	None
	6.14: Y6 maths progress	APS progress measure for previous year	All schools have progress in the confidence range 'average'	None
	6.15: Secondary attainment	TBC	TBC	TBC
	6.16: Secondary progress	TBC	TBC	TBC
Strategic aim 7: All of our schools are graded 'good' or better by Ofsted or are	7.1: External assessment (Ofsted)	Section 8 or Section 5 Ofsted inspection result (between 2-5 year cycle)	100% of schools good or better at Ofsted inspection	None

Strategic aims	KPIs	Measure	2024 target	Confidence level
improving quickly towards achieving 'good' at the next inspection: Owner: Chief School Effectiveness Officer Committee: School Effectiveness	7.2: Internal assessment (predicted Ofsted judgement)	BDMAT's termly review of predicted Ofsted grade	100% of schools have a SIA judgement of good or better	None
Strategic aim 8: The practice of staff is enhanced by high quality professional development and performance management systems: Owners: Chief School Effectiveness Officer & Chief Finance and Operations Officer Committee: Finance and Resources	8.1: Performance management – completed and reviewed on time	All staff performance management reviews are completed on time and include a CPD package for each colleague as quality assured by the BDMAT's SIA	100% of staff have PM reviews completed on time	95% of staff have PM completed on time
	8.2: BDMAT CPD courses receive 95% or above satisfaction levels from participants	All CPD delivered or commissioned by BDMAT includes a survey question asking whether the training was 'effective and likely to impact upon improved provision / service'	95% of training was judged to be 'effective and likely to impact upon improved provision / service'	93% or above
Strategic aim 9: The Trust has highly effective pastoral arrangements in place for staff who, as a result, feel supported and have good life / work balance and the Trust is recognised as a good employer	9.1: Staff attendance	Percentage of attendance during previous 12 months	Above national average	Within 2 percentage points of national average
	9.2: Teacher vacancies (permanent)	Number of permanent teacher posts vacant for 3 months or more (inc leaders)	No vacancies	None

Strategic aims	KPIs	Measure	2024 target	Confidence level
for staff: Owner: Chief Executive Officer Committee: Finance and Resources	9.3: Learning support vacancies (permanent)	Number of permanent learning support posts vacant for 3 months or more	No vacancies	None
	9.4: Support staff vacancies (permanent)	Number of permanent support posts vacant for 3 months or more	No vacancies	None
	9.5: External successful employer recognition	Thrive at Work and other recognised schemes	Awards achieved	None
	9.6: Staff satisfaction working in BDMAT	Annual staff survey through Perspective	95% of staff who complete survey state they are happy working for BDMAT	90% or above
Strategic aim 10: The Trust is sustainable, with secure finances allowing high quality services to underpin our work, ensuring staff in schools are able to concentrate on providing effective provision for their pupils: Owner: Chief Finance and Operations Officer Committee: Finance and Resources	10.1: Number of schools in BDMAT	Number of schools	20 schools or above	19 or above
	10.2: Number of pupils in BDMAT	Number of pupils	4800	4500 or above
	10.3: In-year school surplus (2.5% or above)	Percentage of GAG (General Annual Grant) as surplus	2.5%	0-2% Amber 2%+ Green
	10.4: Achievement of Trust budget (achieved in prior year)	Year end position is better than or equal to budget	All Schools	Variance to budget: (5,000) – 0 Amber 0+ Green

Strategic aims	KPIs	Measure	2024 target	Confidence level
	10.5: Percentage of GAG spent on staffing	Percentage of GAG spent on staff costs excluding LGPS pension deficit payments. Excludes staff paid for through Pupil Premium or other specific grants	TBC (72.5% expected target)	75-73% Amber >73% Green
	10.6: Trust wide reserves	Unrestricted general fund reserves	1.5 months salaries	0.1 month
	10.7: Performance of Central Services (survey)	Annual survey of Heads and LABs on central services (total 40 surveys for 20 schools). Will include a question on overall performance.	90% (36 of 40 returns) positive overall rating	87% (35 of 40)
	10.8: Environmental impact measures	Central Team and each school have an environmental impact action plan that they can evidence they are working towards	100% of school and the central team have met their environmental action plan set in 2020	N/A
	10.9: Estates condition	Grading on external expert survey	No essential repairs on survey reports	N/A
	10.10 H&S Compliance	Compliance on H&S Matrix	100%	95%-99% Amber 100% Green

* Only schools part of the Trust for more than 1 yr will be expected to achieve the 2024 KPI at 31 August 2024