



Strategic Plan

2021-2024

About Our Trust

Balmoral Learning Trust has a clear vision to create **opportunity** through **collaboration**, celebrating the prospects and the potential that can be found in our **community** through our overarching aim to achieve learning and excellence for all

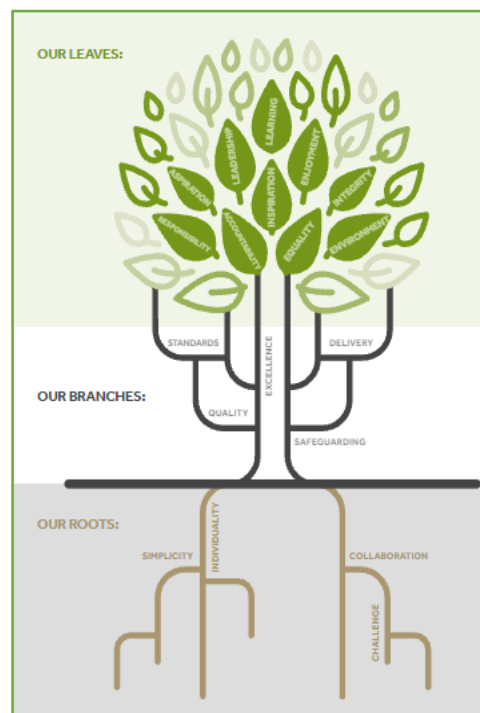
The trust was set up with a structure that focused on **collaboration** whilst retaining the identity and uniqueness of each school and the communities they serve. We recognised that through collective action and supportive challenges we can achieve so much more together.

The symbol of the tree as our logo and brand reflects our approach. The tree's roots, branches and leaves all symbolise elements of our own approach to delivering education and learning across our Trust.

Reflecting this, our values were developed by Members, Directors, Staff and Pupils **collaboratively** to articulate exactly what we stand for. This guides our whole approach to learning and education. Our values are illustrated through our actions and deeds in our day to day life.

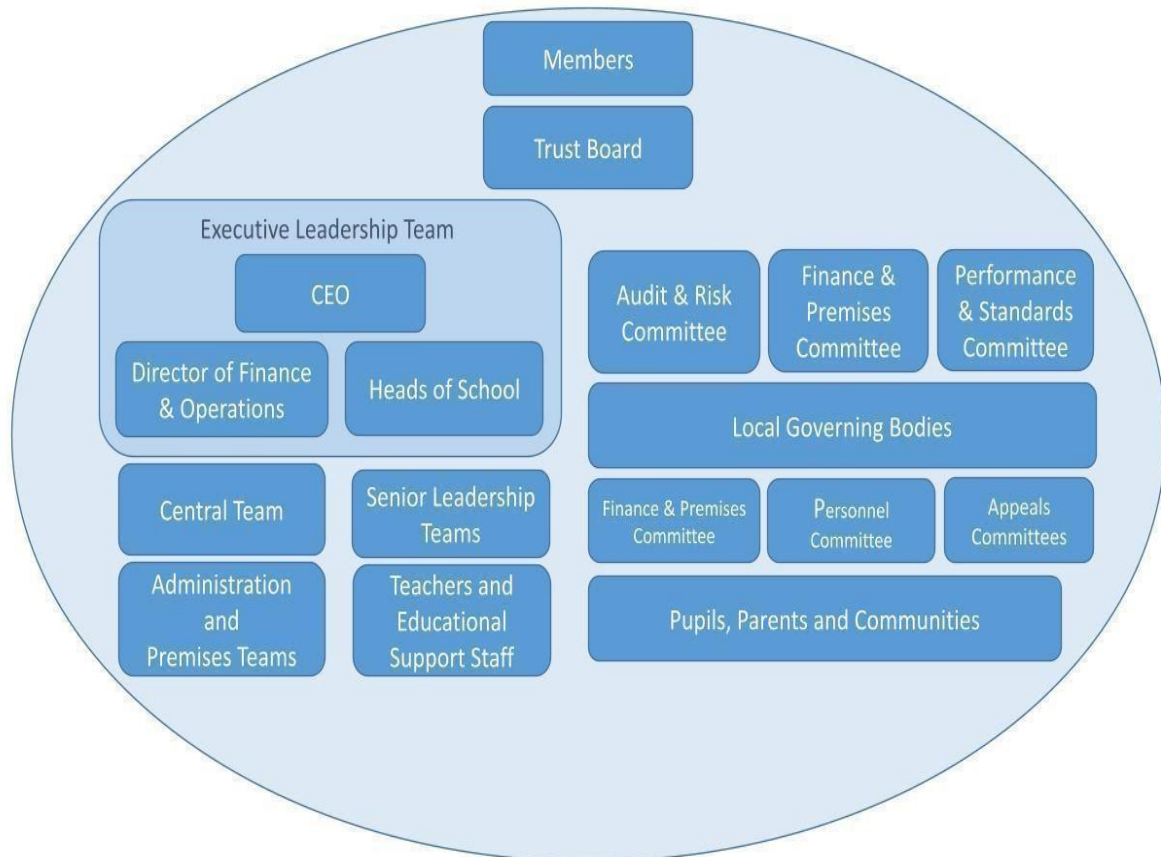
We pride ourselves on the inclusive approach we take to developing children personally, socially, academically, creatively, physically as well as promoting positive mental health and well-being. We aim to empower our children to have the skills and aspirations to move through their education journey to become responsible adults of the future and make a positive contribution as local, national and global citizens.

In September 2020 we began a period of review where we focused on ensuring our structures were fit for purpose, understood by all and ready to take the Trust into the next stage in its development.



Balmoral Learning Trust Structure

We established the Chair of the LGB groups, renamed the head teacher board as the executive leadership board and reviewed our strategic documentation. We reviewed the roles within the Central Services Team to ensure they were more clearly defined and operated across the schools in the Trust to provide a better service to our schools.



The strategic plan for 2021-2024, is intended to outline the key strategic objectives over the next three years, sharing and defining our vision and values, and setting out our key goals. It will establish our targets and the performance measures that will determine the success of the Trust as a whole along with our individual settings in delivering the high-quality education that we are known for.

This overarching strategic plan has been informed by the work carried out in school, the individual school self-evaluations, external reviews and verifications, pupil outcomes and the resulting school development plans. It also focuses on building a strong infrastructure through improvements in centralised services such as HR, finance, governance and estates management. It will set out control measures and systems of accountability to develop a solid foundation for future growth.

Our Vision and Values

All Balmoral Learning Trusts' schools are firmly committed to the vision: "**Opportunity, Collaboration, Community,**"

We fulfil this vision by:

- having the belief that everyone can inspire, can change and can achieve excellence in their own way,
- unlocking potential through knowledge, creativity, application, practice, discovery and passion,
- enabling the community to work together to create greatness inside and outside of the classroom,
- raising aspirations and inspiring adults and children to be ambitious and develop a lifelong love of learning,
- Ensuring the intellectual, spiritual, cultural and physical development of every child to equip them for life in our society.

Our work is based on these values and is designed to ensure our Trust community have opportunities to:

- Cooperate and collaborate
- Achieve excellence
- Raise aspirations and inspire imaginations
- Explore new interests and new ideas
- Develop a deep body of knowledge that forms the base of lifelong learning.

Each school in our Trust will contribute to our aims, supporting each other through **collaboration** and partnerships to ensure the whole is always greater than the sum of the parts.

The Strategic Plan

Our Strategic Plan uses our central vision to shape the core objectives of our Trust in the next three year period. These are:

- To increase and enhance the education offer to all our pupils (**Opportunity**)
- Develop collaboration and partnerships with others to create better outcomes for all (**Collaboration and Community**), only achieved through
- Maintaining a financially viable, sustainable and ethically driven MAT

These objectives will be delivered through five key areas identified through a fundamental review of our MAT undertaken during 2020/21 involving all our stakeholders and objectively overseen by external consultants.

These 5 key areas are:

- Quality of Education
- Leadership and Civic Responsibility

- People
- Governance and Accountability
- Building a Strong Infrastructure

Our proposals for these key areas are set out below.

The Plan

The strategic Plan 2021-2024 is set out in five key areas that are the foundation for our trust:

- People
- Quality of Education
- Leadership and Civic Responsibility
- Governance and Accountability
- Building a strong Infrastructure

Underpinning this strategic plan will be a one-year Operation Plan along with financial budgets and forecasts and the individual school development plans. Each one-year plan will be supported by indications for Year 2 and 3 and acknowledge the rapidly increasing pace of educational change and changes to key personnel.

People

Recognising and valuing the contribution made by children, staff, parents and wider stakeholders

Quality of Education

Providing a rich curriculum that is aspirational for all of our pupils and allows them to succeed in all aspects of their education and personal development

Leadership and Civic Responsibility

To establish an effective Trust leadership structure with the right people, in the right places, with the right training experience and skill set to bring the Trust vision to life and improve educational outcomes for children. To develop partnerships outside of the Trust for the benefit of the Trust.

Governance and Accountability

Governance at all levels will be defined, robust, based on best practice and striving for excellence for all within the Trust. At all levels of governance members will have the right skills and knowledge to set the strategic direction of either the school or Trust and able to monitor the effectiveness of the decisions they make. They will feel empowered to ask the right questions about performance and hold leaders to account.

Building a strong infrastructure

To establish a competent core service offer to our schools in order to support school leaders to focus on wider opportunities for our pupils, staff and the Trust. The Central Team will provide high quality finance, HR, ICT and facilities support to all our schools and partners, ensuring that the Trust is in a strong position to collaborate and grow.

Balmoral Learning Trust Strategic Plan Year 1

Key Area	Priorities	Actions	Measuring Success	What success will look like....
People	Ensure effective high quality CPD for staff at all levels that is aligned with the latest educational research	<p>Identify additional training and support Early Career teachers have missed due to the pandemic and offer</p> <p>Identify staff for the revised NPQ qualifications and make applications- this will link with performance management.</p> <p>Through performance management interviews identify the training needs for individual staff at all levels</p> <p>Build up the skills of subject leaders through a programme of peer review and subject leader meetings</p> <p>Heads of school to identify group training needs for groups of staff to ensure</p>	<p>All schools to keep CPD logs that are reviewed termly that include the impact of training, staff meetings and any mentoring sessions</p> <p>Staff applications for the revised NPQ's completed and dates agreed to begin training</p>	<p>The Trust has highly skilled staff who are strong classroom teachers and leaders to drive school improvement through their knowledge of the curriculum, research etc</p> <p>The learning from EEF- Effective Professional Development is used to plan the development programme</p> <p>The staff who complete the NPQ leading teacher development support staff both within their own school and across the Trust</p>

Key Area People		strong links and cost savings		
	Priorities	Actions	Measuring Success	What success will look like.....
	Develop a continuous programme of support for staff wellbeing that is embedded across the Trust	<p>Appoint a lead person in the central team with a remit for HR including well-being.</p> <p>Agree termly well-being actions linked to school and national events</p> <p>Use DfE funding to appoint a senior mental Health and well-being lead in school to lead the school wellbeing team</p> <p>Source effective external support for staff who would like to access it</p> <p>Start an annual staff survey to gain a true picture of the views of staff</p> <p>Ensure staff with leadership responsibility are given time to fulfil their responsibilities.</p>	<p>Set up wellbeing Wednesday newsletter for staff monthly</p> <p>Analysis of staff absences and staff turnover</p> <p>Feedback from staff surveys</p> <p>Minutes of wellbeing team meetings</p>	<p>Staff can identify the person in the central team that they can go to for HR and wellbeing advice</p> <p>The Trust have in place effective support systems including specialist programmes of support when required</p> <p>Staff are kept informed of initiative to support them eg mindfulness, flu vaccinations</p> <p>Staff survey identifies positive development</p>

Key Area	Priorities	Actions	Measuring Success	What success will look like.....
People	Identify lead practitioners across the Trust to support with both the development of staff and improved outcomes for children	<p>Identify staff to access the specialist NPQ qualifications</p> <p>Begin to build a school improvement team with staff from both schools including support staff, teachers and leaders</p>	<p>Schools have identified staff who are effective classroom practitioners to support with the development of other staff</p> <p>Applications for NPQ programmes</p>	Staff will share and learn from the best practise resulting in a self-improving system across the Trust
	To appoint a new head of school at Hetton Lyons and ensure stability in the leadership structure	<p>Use the NGA toolkit to formulate a timeline for appointment</p> <p>Put together an appointment pack</p> <p>Take the views of stakeholders on what is essential to Hetton Lyons</p> <p>Interview and appoint.</p> <p>Training needs identified</p>	<p>Safer recruitment time line kept under review</p> <p>Use external support to oversee the process</p>	<p>A head of school is in place for September 2022</p> <p>Transition plan in place for the appointed person</p>

Key Area	Priorities	Actions	Monitoring	Success Criteria
School Improvement and Outcomes for Children	Ensure an effective and robust Covid 19 recovery plan is in place that ensure children catch up on lost learning and reach age related expectations	<p>Review the current remote education plans using the DfE guidance and ensure areas identified are included in individual school improvement plans</p> <p>Ensure recovery plans and strategies are in place across the Trust that support all pupils including SEND and disadvantaged that are built on good quality evidence.</p>	<p>The DfE remote education evaluation is completed and shared with directors and members.</p> <p>Plans in place that maximise the funding available and are targeted at the pupils who need it the most</p> <p>Pupil data through PP reviews</p> <p>Impact of EEF training</p>	<p>Pupil Progress reviews show that identified children make the catch up required and there is evidence of the gap closing especially for disadvantaged children</p> <p>School leader plans link to the research on the best approaches to catch up and high quality teaching and learning</p>
	Raise attainment and improve progression by ensuring there is a rigorous and robust programme of quality assurance that supports teachers and leaders build capacity and expertise to raise standards to deliver positive outcomes for all children	Ensure, through a programme of monitoring, that the phonics curriculum is robust, has fidelity to a scheme, that staff are skilled and equipped to teach it and children, including those with SEND and are disadvantaged	<p>Pupil progress review and data every six weeks</p> <p>Staff and parent feedback</p> <p>SIP report on the approach to phonics and early reading</p>	<p>Phonic results improved across the Trust.</p> <p>The gap closes for disadvantaged pupils</p> <p>The impact of high quality phonics teaching and the following spelling programme can be seen in</p>

School Improvement and Outcomes for Children		make accelerated progress.	Observations of phonics teaching	writing
	Priorities	Actions	Monitoring	Success Criteria
		<p>Review how we collect and gain evidence in foundation subjects to assess pupil outcomes and an understanding of what they have learnt</p> <p>Implement the revised EYFS Framework. That staff are suitably trained to deliver an effective programme and assessment and that there is an internal programme of support and challenge for EYFS staff.</p>	Reviews of teaching and learning	<p>the outcomes in reading and writing across the Trust</p> <p>Assessment Policy in place that clarifies how assessment in the foundation subjects will be completed and how the information will be used.</p>
Ensure the principles of the Trust curriculum statement are embedded across all subjects to ensure the school curriculum is ambitious, well sequenced, ambitious and where knowledge is embedded at each stage of the journey	<p>Have a programme of subject lead meetings to ensure the school curriculum plans align with the Trust curriculum plan</p> <p>Use external verification to develop subject leadership and curriculum areas. This year focusing on locality</p>	<p>Minutes of meetings</p> <p>Curriculum Intent</p> <p>Curriculum Planning</p> <p>School review</p>	<p>Each school has a well-designed, ambitious curriculum in place which meets the needs of the children within each school context.</p> <p>The aims objectives of the Trust curriculum statement</p>	

		and the Primary Quality History mark	Peer review reports that are followed up after one term	are visible in each school's curriculum design.
Key Area	Priorities	Actions	Monitoring	Success Criteria
School Improvement and Outcomes for Children		Monitoring of curriculum intent, implementation and impact of the curriculum through teaching reviews and subject peer review.		
	Ensure the wider curriculum, including keeping children safe, equality, aspirations, SRE is embedded across all subjects	Ensure all aspects of the wider curriculum are mapped so that schools know they have full coverage	Curriculum mapping Staff and pupil feedback	The school curriculum develops children so they leave with a broad range of skills and knowledge so they have an opinion and awareness of local, national and global issues and how to keep themselves safe.
Leadership and Civic Responsibility	To develop a strong, knowledgeable and effective central leadership team who offer appropriate, challenge support and development to secure an effective self-improving system in all aspects of the Trusts business	Develop and review the business support task allocation document to ensure role are clearly defined and segregated to ensure a strong focus on key areas and accountability within them	External monitoring across all aspects of the Trust business Performance management Reviews Feedback from users	Strong leadership across all aspects of the trust's business, strong systems in place Improved outcomes for children

Leadership and Civic Responsibility		Effective support for all central team staff through CPD and networking	Feedback from audit	
	Priorities	Actions	Monitoring	Success Criteria
	Further develop the role of the executive team to ensure strong leadership , consistency in approach and drive for school and trust improvement	Further develop the executive team so they all staff have responsibility for a key area of development	Minutes SIP reports	The Trust has the leadership and management capacity to deliver sustained improvement in pupil outcomes
Develop leadership across the Trust to support the implementation of the curriculum and wider curriculum. Ensuring leaders have the skills to support and develop teaching , learning and the curriculum	Further develop subject teams across the Trust and continue to engage in peer review and school to school support Develop leaders action plans to more clearly focus on why they have selected targets and what the outcomes for children will be. Engage with the revised NPQ's to support the development of subject	Minutes of subject leader meetings Subject leader monitoring reports SIP reports CPD records Pupil progress reviews	Confident and effective leaders across all schools are champions for their subjects and areas. Strong pedagogy, monitoring and evaluation ensures the schools continue to perform above national expected levels.	

		leaders and the leaders of other teachers		
Key Area	Priorities	Actions	Monitoring	Success Criteria
Governance and Accountability	<p>Work in conjunction with directors and local governors to enhance the scheme of delegation and provide training that develops skills and expertise of governance at all levels</p> <p>Further develop the governance framework to ensure there are clear roles and responsibilities and work towards the aims of the trust</p> <p>Further develop the role of the LGB to effectively support and challenge the school including the development of an annual governor action plan</p> <p>Preparing for a MAT Evaluation</p>	<p>Provide training throughout the year on key elements of the Trust and school work e.g. safeguarding, EYFS, holding leaders to account.</p> <p>Review the governor monitoring form</p> <p>Establish protocols for school visits, monitoring that are understood by all</p> <p>Ensure all areas of the SDP identify a lead governor to be part of the monitoring of actions</p> <p>Establish a governor monitoring programme, skills audit and training plan</p> <p>Engage with external support to support in the</p>	<p>Governor induction pack reviewed annually</p> <p>Timetable for Governor monitoring and agreed format for reporting</p> <p>Review structures of the LGB include identified key roles</p> <p>Minutes of Chair briefings</p>	<p>Directors have a strong understanding of the schools within the Trust and understand the strengths and challenges they face</p> <p>Governors effectively the challenge the school to ensure the best outcomes for children</p> <p>Strong support is in place to provide the right information, evidence and advice to boards at all levels</p>

		external evaluation of the MAT		
Key Area	Priorities	Actions	Monitoring	Success Criteria
Building a Strong Infrastructure	<u>Finance</u>			
	Develop systems to improve budget monitoring	Implement updated budgeting system and update master scenario monthly to reflect up-to-date changes	Monthly budget reports shared with senior leaders	Accurate picture of current position and staff aware of funding available, allowing them to make decisions based on the effective use of resources.
	Collaborative procurement across the Trust	Central Team to oversee approved suppliers and establish links providing best value	Benchmarking carried out periodically Staff appraisal	Trust confidence that expenditure is achieving value for money
	Look to increase income from additional sources outside of government funding	Forge community links with local companies Liaise with Friend of the School regarding fundraising initiatives Apply for grant funding from available sources e.g. CIF bids, Awards for all etc.	Budget reports re: contributions and donations Staff appraisal	Increased sources of additional income Additional funding to spend on resources and experiences for pupils Additional funding for the renovation of the Trust estate.

Key Area	Priorities	Actions	Monitoring	Success Criteria
Building a Strong Infrastructure	<u>Human Resources</u> Develop and Employee Assistant Programme to support the health and well-being of staff Introduce well-being leads in schools	Investigate available EAP systems on the market, inc. access to face to face counselling Agree and implement an appropriate EAP offer for staff Promote the EAP to prospective employees in job adverts Identify and train staff to act as the senior well-being lead within school to embed well-being within the curriculum	Staff sickness absence monitoring reports Staff satisfaction surveys School review SIP reports	Improved employee attendance Good levels of staff satisfaction Increased volume and quality of candidates for job vacancies Effective awareness and incorporation of well-being within the curriculum.
	<u>ICT</u> Ensure systems are fit for purpose in terms of risk and safeguarding	Use 360 online safety review to asses current policy and practise.	360safe results Safeguarding monitoring visits from LA	Systems and processes deemed fit for purpose

Key Area	Priorities	Actions	Monitoring	Success Criteria
Building a Strong Infrastructure		<p>Review and update online safety licences such as Smoothwall</p> <p>All documents to be saved on Google Drive, allowing for restoration if lost / damaged</p> <p>Move systems away from the servers to be hosted online, allowing remote access and protecting from fire risk</p>	<p>Software licences register</p> <p>Meetings and communications with staff</p> <p>Regular meetings with third party providers of hosted systems</p>	<p>Appropriate licences up to date</p> <p>All staff using Google Drive</p> <p>Key systems e.g. finance, budgeting and MIS hosted externally</p>
	Provide ICT equipment for curriculum use	Create an ICT strategy for the Trust, including refresh budget for rolling replacements	<p>ICT asset register</p> <p>ICT refresh budget</p>	<p>Up to date equipment log</p> <p>Strategy for ICT replacement implemented</p>
	<u>Estates</u>			
	Promoting energy efficiency across the schools in the Trust in the face of rising utility costs	Ensure staff are aware of the energy efficiency message e.g. switch off all computers at the end of the day	Monitoring reports reflect improved energy efficiency	<p>Energy usage reduces</p> <p>Reduction in energy costs</p>
Key Area	Priorities	Actions	Monitoring	Success Criteria

Building a Strong Infrastructure		Submit a CIF bid for replacement boilers and heating system at EHPA		CIF bid successful
	Replace fire alarm system / sensors at HLPS	Get quotes for rolling replacement of fire alarm sensors	Third party SLA agreement	Boilers and heating system replaced leading to greater efficiency and reduced energy costs All sensors are functioning and up to standard
	Implement succinct risk management systems across the Trust	Investigate online options / speak to other schools		Policies, risk assessments and asset registers held in one place

Medium and Longer Term Plans

Key Area	Year 2 2022-2023	Year 3 2023-2024
People	Have a fully functioning Central Team that is made up of Trust staff and external support secured through SLAs	Establish a lead professional for school improvement. Effective leaders in the Trust will be identified as specialists and support other staff across the Trust.
School Improvement	Develop an agreed system for assessment in Foundation Subjects across the Trust including improved moderation so that judgements are	Ensure that self-review and documentation shows the position of the Trust in terms of curriculum, teaching and learning and outcomes in a way that is not just an amalgamation of school data but

<p>and Outcomes for Children</p>	<p>aligned and consistent with trained staff to lead the process.</p> <p>Continue to develop subject knowledge pedagogy to increase the amount of outstanding teaching across the Trust</p>	<p>demonstrates the overarching MAT strategies and their impact impact</p>
<p>Leadership and Civic Responsibility</p>	<p>Support the induction of the HoS at Hetton Lyons Continue to support the CPD of staff through NPQ's and create more opportunity to for career progression</p> <p>Review the performance management systems and expectations across the Trust especially for staff at the UPS standard</p> <p>Ensure staff and pupils are engaged in leadership roles within the school and in the community</p>	<p>Strong programme of coaching and mentoring across the Trust using staff who have completed the NPQ in leading teacher development</p> <p>The MAT continues to develop partnerships and share expertise with schools outside of the MAT</p>
<p>Governance and Accountability</p>	<p>Continue to develop Trust statements to ensure school policies reflect the aims and objectives of the Trust</p> <p>Conduct a Trust self review using the Governing Body Self Review Tool to identify areas of development</p>	<p>External review of Governance using a NLG</p>
<p>Building a Strong Infrastructure</p>	<p>Apply for additional funds to support school development and Estate improvements</p> <p>Continue to develop the use of benchmarking data and KPI's to inform decision making at all levels</p>	<p>Increase energy efficiency and reduce the carbon footprint</p> <p>Formulate a strategy for Trust growth</p>

Growth- Growing to enhance the stability of the Trust and our ability to add value to the schools in the Trust

The discussion around trust growth will always include a discussion of our vision, values and where we want to be as a trust. Our strategy is:

- Growth with care to ensure we have the capacity to meet the needs of the new school without compromising the existing schools. This will be done through a full review annually.
- A recognition that each school that joins will have its own context including its effectiveness, size and phase
- Forging and maintaining relationships in the community and beyond to share our key strengths and values openly and transparently. To engage regionally and beyond to inform decision making and promote the work of the Trust.
- To be transparent with organisations that wish to join us about what it means to be a member of Balmoral Learning Trust and the benefits for their organisation