

# KENTON SCHOOLS ACADEMY TRUST



## STRATEGIC PLAN

2021-2024

# The Vision, Mission and Values of the Trust

## Vision

Through the provision of high quality inclusive education, the Trust will support and enable all our learners to believe in themselves, to succeed in life and aspire to be all that they can be.

## Mission

Keep our young people at the centre of everything we do by:

1. Ensuring the highest quality education that we can provide throughout their learning journey in the Trust by:
  - Establishing excellence as the standard of everything we do, seeking best practice and quality through collaboration within and outside the Trust.
  - Seeking out opportunities beyond the boundaries of our schools to allow learners to develop a global view and experience diversity, challenge, competition and difference.
  - Recruiting, developing and retaining high-quality staff who can bring about excellence in teaching and learning.
2. Providing outstanding leadership in our schools and across the Trust to deliver our vision:
  - Recruiting and developing moral, transformational and innovative leaders at all levels in our schools and across the Trust.
  - Having high expectations of all leaders to model the Trust's values, to celebrate what is different in each child, to nourish and support diversity and to create safe and orderly environments where our learners can learn and thrive.
  - To support our leaders through challenge and development to meet demanding targets and yield high quality education and support.
  - To support and challenge our local governing bodies to ensure children are safeguarded and excellence is delivered in Trust schools.
3. Supporting our communities to ensure parents and carers have the confidence to make us their chosen provider:
  - Through their understanding that we offer a place for all children to achieve, regardless of faith, culture, ability or background; ensuring all stakeholders grasp our focus on inclusivity as evidenced in our approach and provision.
  - Through their understanding that safety, wellbeing and personal development of their child is of the utmost priority of all school staff and volunteers.
  - Through promoting positive attitudes to lifelong learning, committing to the communities of our schools and supporting families to remove any barriers to learning.

## Values

We believe:

- that the Trust is stronger together and that collaboration is always more effective than competition
- that Inclusivity is a pillar of our learning community – no groups or individuals will be left behind and we are committed to being a support for all
- that morality, honesty and integrity are at the heart of all we do together
- in the pursuit of excellence for all and that all learners can achieve
- in inspiring all our learners to question, research, care, engage and thrive
- that community investment will deliver dividends for all learners.

# Introduction & Background

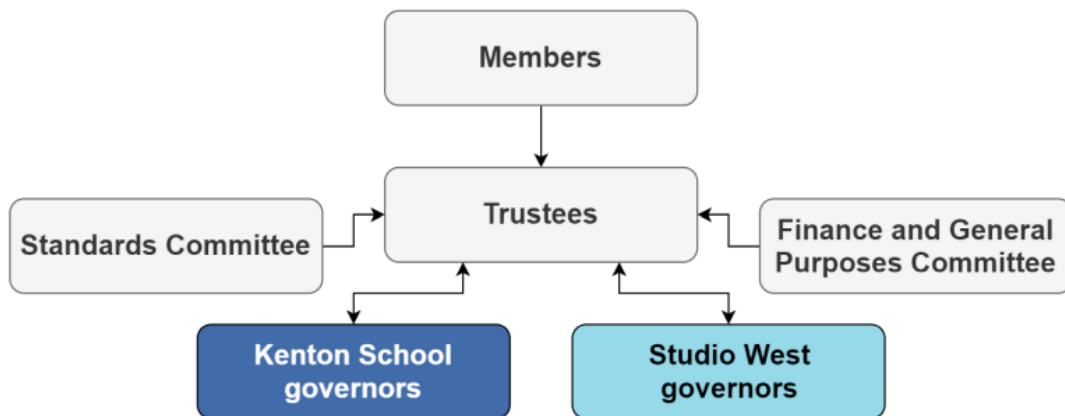
## Brief History of the Trust.

Kenton Schools Academy Trust, which is based in the West End of Newcastle upon Tyne, was established as a multi-academy trust (MAT) in 2014. The Trust currently comprises two academies: Kenton School, our 11-19 community academy, which is one of the largest schools in the North of England, and Studio West, the first 11-19 studio school in the UK. Our academies were oversubscribed in September 2020 but face increasing competition from new schools opening locally.

Our academies were last inspected by Ofsted in 2019. Kenton School’s sixth form was judged to be ‘good’, although the overall effectiveness of the school was deemed to be ‘requiring improvement.’ Studio West was judged to be ‘good’ in every category.

## Trust Structure and Sub-committees.

The Trust has undergone a significant re-organisation over the last three years, including a wholesale revision of its scheme of delegation and sub-committee structure.



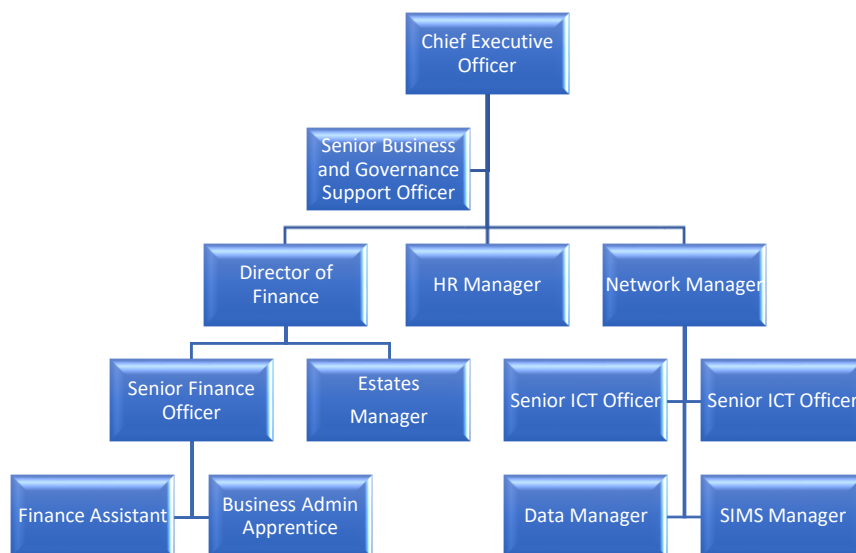
## External Reviews of Governance and Financial Management

In July 2019, an external review of governance was commissioned by the Department for Education (DfE) from a National Leader of Governance. The report concluded that: “The Trust Board of Kenton Schools Academy Trust is most effective and well led, and offers a strong blend of support and challenge to members of the schools’ communities, particularly senior leaders. Pupils and parents all benefit from the work that the KSAT Board carries out.”

Also, at the same time, an external review of the Trust’s financial management was conducted by a DfE appointed School Resource Management Adviser, who reported that “the MAT now has new leadership and there is clear evidence of strong financial management” **and** “the financial leadership of the Trust is strong, timely and in sufficient detail to provide assurance on the continuing effective management of the MAT budget.”

## The KSAT Central Services Team.

The Trust and its schools are supported by a central services team delivering core trust functions, such as HR, Finance, Estates, Data and ICT.T



## The Strategic Plan 2021-24

The Trust's strategic plan is a working document and is designed to build in the Trust's ability to monitor and evaluate impact against specific KPIs and success criteria. The plan is intended to complement, not to duplicate, the detailed improvement plans that are produced annually in each school and monitored rigorously by the Local Governing Boards and the Standards Sub-Committee. Trustees have decided that the 2021-24 strategic plan should address the following priority areas:



## Section 1: The Quality of Education in our Schools

### Strategic Objectives for August 2024

- The quality of education in our schools, including in the sixth form, is judged by Ofsted or independent external review to be at least good and improving.
- The broad, balanced and inclusive curriculum offer in each of the Trust’s schools leads to student outcomes that are above national average progress measures.

### Where are we now?

- In 2019, Ofsted judged the quality of teaching, learning & assessment and outcomes for students to be good at Studio West (SW) and to require improvement at Kenton School (KS). The effectiveness of 16 to 19 education was judged to be good in both schools.
- Current and targeted positions in relation to key outcomes are as indicated in the tables on page 5 below.

### Strategy

- Address priorities for improvement at pace, supported with urgent time-framed actions, within Academy Improvement Plans (AIPs) in each school
- Specifically address key areas of underperformance in leadership and teaching
- Maintain collaborative drive for improvement with ONE Vision in KS
- Focus self-evaluation sharply and honestly on strengths and areas for further improvement and commission external annual reviews in KS to moderate internal judgements
- Trust Leadership and Governance monitors, supports and challenges impact to ensure pace of improvement
- Post-COVID review informs self-evaluation and improvement priorities
- Post-COVID well-being and learning support is in place to ensure optimum focus on individual needs

KSAT STRATEGIC PLAN 2021-24: SECTION 1: THE QUALITY OF EDUCATION IN OUR SCHOOLS					
Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 1.1: Ensure the Quality of Education in our schools, including in the sixth form, is good or better</b>					
• Review SEF in light of COVID-19	CEO	July 21	SEF judgments reviewed & moderated All KPIs are met. See Page 5 below	LGBs monitor half-termly.	
• Quality assure all AIPs as fit for purpose in line with 2021 outcomes		Oct 21	AIPs completed & QA'd as good		
• Commission external review in KS		July 22	All KPIs are met. See Page 5 below	Standards Committee reviews termly.	
• Quality assure all AIPs as fit for purpose in line with 2021 outcomes		Oct 22	AIPs completed & QA'd as good		
• Commission external review in KS		July 23	All KPIs are met. See Page 5 below		
• Quality assure all AIPs as fit for purpose in line with 2021 outcomes		Oct 23	AIPs completed & QA'd as good	Board evaluates annually	
• Commission external review in KS and SW		July 24	All KPIs are met. See Page 5 below		
Notes:					

## SECTION 1: Quality of Education Success Criteria 2021-24

**TABLE ONE: Current Ofsted judgement (2018-19), with 2019-20 and 2020-21 self-evaluation (SEF) judgements and target SEF key performance indicators.**

	2018-19 Ofsted		2020-21 Current SEF		2021-22 Target SEF		2022-23 Target SEF		2023-24 Target SEF	
	KS	KS	KS	SW	KS	SW	KS	SW	KS	SW
<b>Overall Effectiveness</b>	3	3	3	2	2	2	2	1	2	1
Quality of Education	3	3	3	2	2	2	2	1	2	1
Behaviour and Attitudes	3	2	2	2	2	2	2	1	1	1
Personal Development	3	2	2	2	2	2	2	1	1	1
Leadership & Management	3	2	2	2	2	2	1	1	1	1
6 <sup>th</sup> Form	2	2	2	2	2	N/A	1	2	1	1

**TABLE TWO: Key Performance Outcomes against National Benchmarks in Kenton School**

KS GCSE	2019	2020	2021 Target	2022 Target	2023 Target	2024 Target	Nat 2019
Progress 8	-0.62	-0.32*	-0.2	0.0	0.1	0.2	-0.03
En/Ma 5+	31%	37%	40%	41%	42%	43%	43%
En/Ma 4+	53%	57%	62%	63%	64%	65%	65%
EBacc Point Score	3.3	3.4	3.9	4.0	4.1	4.2	4.1
Destinations - EET	97.3%**	97.1%**	100%	100%	100%	100%	94%***
<b>Post-16</b>							
Academic VA	-0.13	0.31	0.2	0.2	0.2	0.2	-0.02
Applied General VA	-0.12	0.12	0.3	0.3	0.4	0.4	-0.01
Technical	Dis-	M+	M+	M+	M+	M+	M+
Destinations - EET	87.3%**	83.9%	90%	90%	90%	90%	81%***

**TABLE THREE: Key Performance Outcomes against National Benchmarks in Studio West**

Studio West GCSE	2019	2020	2021 Target	2022 Target	2023 Target	2024 Target	Nat 2019
Progress 8	-0.17			0.2	0.3	0.4	-0.03
En/Ma 5+	21%			50%	50%	50%	43%
En/Ma 4+	61%			75%	75%	75%	65%
EBacc Point Score	2.6			3.6	3.8	4.0	4.1
Destinations - EET	97%**			100%	100%	100%	94%***
<b>Post-16</b>							
Academic VA	0.71	<b>1.06</b>				0.5	-0.02
Applied General VA	-0.26	<b>0.48</b>				0.5	-0.01
Technical	M					D	M+
Destinations - EET	100%**	100%**				100%**	81%***

**Notes:** \* Progress 8 indicator, using 2019 conversion matrix. \*\* School held data at point of transfer.  
\*\*\* EET latest national figures for sustained Destinations (2017) Targets reviewed annually.

## Section 2: The Safety and Well-being of our Students and Staff

### Objectives by August 2024:

- The vast majority of students feel safe, valued and supported in each of the Trust’s schools, as evidenced in what they say and how well they attend.
- The behaviour, attitudes and personal development of students are judged to be good or better in our schools.
- The vast majority of staff in each of the Trust’s academies and across the central team feel valued and supported in carrying out their roles and responsibilities, as evidenced in what they say, how long they are retained, and how well they attend.

### Where are we now?

- Student and staff voice in Trust schools and across the Central Team confirms that the Trust is a supportive environment in which to work and learn.
- Recent rates of both student and staff attendance relative to national also indicate that this is the case.

### Strategy

- Post-COVID well-being questionnaire informs well-being needs of both students and staff
- Diagnosis is used to inform staff support and training
- Diagnosis is used to inform students’ Personal Development programme in school, evaluated annually.
- Sustained focus in Academy Improvement Plans on improving overall levels of attendance and reducing levels of persistent absence so that both measures are at least in line with national in Trust Schools.

<b>KSAT STRATEGIC PLAN 2021-24, SECTION 2: THE WELL-BEING OF STUDENTS AND STAFF</b>					
Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 2.1: The great majority of students feel safe and well-supported. Behaviour, attitudes and personal development of our students are judged to be at least good in our schools.</b>					
• Review SEF in light of COVID-19	CEO	July 21	SEF judgments reviewed & moderated KPIs are met. (Table 1 on p5, & p7 below)	LGBs monitor half-termly.	
• Quality assure all AIPs as fit for purpose re 2021 outcomes		Oct 21	AIPs approved & QA’d as fit for purpose		
• Commission external review in KS		July 22	KPIs are met. (Table 1 on p5, & p7 below)	Standards Committee reviews termly.	
• Quality assure all AIPs as fit for purpose re 2022 outcomes		Oct 22	AIPs approved & QA’d as fit for purpose		
• Commission external review in KS		July 23	KPIs are met. (Table 1 on p5, & p7 below)		
• Quality assure all AIPs as fit for purpose re 2023 outcomes		Oct 23	AIPs approved & QA’d as fit for purpose	Board evaluates annually	
• Commission external review in KS and SW		July 24	KPIs are met. (Table 1 on p5, & p7 below)		
Notes:					

Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 2.2: The great majority of staff feel valued and supported in their roles</b>					
<ul style="list-style-type: none"> <li>Conduct post COVID-19 staff survey</li> <li>Review staff well-being policy in the light of staff survey responses</li> </ul>	HR Manager	July 21	Staff survey issued for completion to all Trust staff	LGBs monitor half-termly.	
			Survey findings inform well-being policy for Autumn 2021 implementation		
<ul style="list-style-type: none"> <li>Implement revised policy strategies &amp; include in appraisal meeting agendas</li> </ul>		Oct 21	All staff are aware of and have signed up to adopting well-being strategies.	F&GP Committee review termly	
<ul style="list-style-type: none"> <li>Conduct staff well-being survey</li> </ul>		July 22	Staff well-being KPIs are met (below)	Board evaluates annually	
<ul style="list-style-type: none"> <li>Include well-being strategies in all appraisal meeting agendas</li> </ul>		Oct 22	All staff are aware of and have signed up to adopting well-being strategies.		
<ul style="list-style-type: none"> <li>Conduct staff well-being survey</li> </ul>		July 23	Staff well-being KPIs are met (below)		
<ul style="list-style-type: none"> <li>Include well-being strategies in all appraisal meeting agendas</li> </ul>		Oct 23	All staff are aware of and have signed up to adopting well-being strategies.		
<ul style="list-style-type: none"> <li>Conduct staff well-being survey</li> </ul>		July 24	Staff well-being KPIs are met (below).		
Notes:					

## Success Criteria

Student safety and well-being questionnaire. 100% of students feel safe at school or know what to do if they do not.

100% of students identified with well-being issues are in receipt of support appropriate to their needs.

Student overall attendance in Trust schools is at least in line with national average, with a view to achieving >96%.

Student Persistent Absence in Trust schools is at least in line with national average, with a view to achieving <10%.

Staff safety and well-being questionnaire. At least 90% of staff feel that safety measures in school are appropriate and clear, and are satisfied their wellbeing needs are being considered and met as far as possible.

Staff attendance rates in Trust schools and across the central team are above national, with a view to achieving 96%.

At least 90% of those staff leaving agree in their exit questionnaires that they have been well supported in their personal well-being and their professional development.

Ofsted judge Personal Development in both schools to be at least good.



## Section 3: The Adequacy and Quality of the Learning Infrastructure (including ICT)

### Objectives for August 2024

- The learning infrastructure in our schools, including the application of new technologies, enhances the learning experience of all students and ensures the safety of all users.
- Trust ICT systems are up to date, secure and well maintained, and deliver the required services across the Trust.
- ICT service provision (personnel and systems/hardware) meets the ICT needs of the Trust and adapts to new and emerging ICT requirements to facilitate teaching, learning and back office support.

### Where are we now?

- The Trust is currently implementing the recommendations of the external security report and reviewing the ICT Services structure to determine the best and most efficient offer for the Trust and our schools.
- The Trust has approved the technical refresh for our schools (the project will be completed in March 2021) and is developing online systems to support a blended learning approach for students.
- **KS** is a new-build school (2008) currently in Year 13 of a 25-year PFI lease, with 2 older buildings, North Block (1950s) and the College building (partially refurbished in 2019), which is let to external users. The main building is well maintained by PFI lifecycle works and the quality of the learning infrastructure is generally good.
- **SW** is a partially refurbished 1960s building, some parts of which are in a poor state of repair; significant funding has been secured through CIF to renew large sections of the roof; further bids have been submitted to enhance sports and PE provision and renew the West Wing roof. The school requires further accommodation to meet the needs of a growing, oversubscribed school.

KSAT STRATEGIC PLAN 2021-24, SECTION 3: THE LEARNING ENVIRONMENT (INCLUDING ICT)					
Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 3.1: Trust ICT systems are up to date, secure and well maintained, and deliver the required services for students, staff, parents and community</b>					
<ul style="list-style-type: none"> <li>• Implement all recommendations of the ICT security review.</li> <li>• Review and implement the ICT roadmap</li> <li>• Incorporate a comprehensive disaster recovery solution</li> </ul>	Network Manager	July 21	Server refresh completed and effective	F&GP Committee monitors termly.	
			All recommendations implemented		
		Oct 21	Disaster recovery fully operational		
		July 22	ICT roadmap has been fully implemented		
		July 23	Firewall and security systems updated		
	July 24	Trust's systems continue to be safe and latest security measures are up to date	Board evaluates annually		
<b>Notes:</b>					

Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 3.2: ICT service provision (personnel and hardware) meets the ICT needs of the Trust</b>					
<ul style="list-style-type: none"> <li>• Instal new ICT Hardware to renew existing infrastructure.</li> <li>• Review existing ICT service provision (including personnel and hardware)</li> <li>• Assess the need for and implement a rolling refresh programme of desk-tops and interactive whiteboards</li> </ul>	CEO & Network Manager	July 21	ICT switching infrastructure replaced	F&GP Committee monitors termly.	
			Review of current service provision (personnel) completed & approved by F&GP		
		Oct 21	New ICT service provision in place	Board evaluates annually.	
			Blended learning policy fully operational		
		July 22	All obsolete interactive whiteboards replaced		
		July 23	All obsolete desk top computers replaced		
July 24	Service provision (personnel and hardware) meets the ICT needs of the Trust				
<b>Objective 3.3: The educational facilities at Studio West meet the full needs of the curriculum</b>					
<ul style="list-style-type: none"> <li>• Continue discussions with the LA and the ESFA to review the lease at SW and open up further learning space, including sports provision as a priority.</li> <li>• Submit annual CIF bids to address the inadequacy of provision at Studio West and the poor state of certain aspects of the building</li> </ul>	CEO & Estates Manager	July 21	Lease agreement signed off by DfE; extension of West Wing included in red line	LGB monitors half-termly	
			CIF bid to update sports facilities successful		
			Capacity report completed and route map written staged expansion up to Sep 2023		
		Oct 21	New sports facilities being fully used	Board reviews termly	
		July 22	Asset management plan revised to include all new accommodation and specialist rooms		
		July 23	All specialist facilities completed on site		
July 24	The educational facilities are of high quality & meet all the needs of the 11-19 curriculum.				
<b>Objective 3.4: The learning infrastructure in our academies enhances the experience of all learners</b>					
<ul style="list-style-type: none"> <li>• Create 3-year asset management plans and review annually</li> <li>• Agree priority spending plans and allocate funding accordingly</li> </ul>	Estates Manager	July 21	Fully costed 3-year asset management plans are in place for both SW & KS	F&GP Committee monitors termly.	
		Oct 21	Spending allocated by F&GP to priorities		
		July 22	Asset management plans reviewed		
		Oct 22	Spending allocated by F&GP to priorities	Board evaluates annually.	
		July 23	Asset management plans reviewed		
		Oct 22	Spending allocated by F&GP to priorities		
		July 24	Asset management plans reviewed		
<b>Objective 3.5: All learners and users of the Trust's facilities are safe and any identified risks are addressed urgently</b>					
<ul style="list-style-type: none"> <li>• Conduct annual health &amp; safety inspections of both sites as per SLA with Newcastle CC</li> <li>• Address all high, medium and low recommendations</li> <li>• Review the critical incident and business continuity plans (CICPs) annually</li> <li>• Deliver SLT scenario training as appropriate</li> </ul>	Estates Manager	July 21	All H&S recommendations have been addressed on both sites	F&GP Committee monitors Termly.	
			All CICPs fit for purpose & training delivered		
		July 22	All H&S recommendations have been addressed on both sites	Trust Board evaluates annually.	
			All CICPs fit for purpose & training delivered		
		July 23	All H&S recommendations have been addressed on both sites		
			All CICPs fit for purpose & training delivered		
		July 24	All H&S recommendations have been addressed on both sites		
			All CICPs fit for purpose & training delivered		
<b>Notes:</b>					

## **Section 4: Governance, Leadership and Sustainability of the Trust**

### **Strategic Objectives by August 2024**

- Adopt an effective leadership model, inspired by innovative vision and effective management, that enable the Trust to transform its educational provision to all-round excellence, underpinned by a robust financial position that maintains the Trust's control over its own decisions.
- Sustain a good governance culture through continuous improvement of governance systems and practices that strike a balance between conformance with a regulatory framework and strategic success, with the ultimate objective of promoting key stakeholders' goals.

### **Where are we now?**

- Following a period of retrenchment, the Trust is financially strong and has evidence of improving outcomes. Governance structures are robust with a well-functioning Scheme of Delegation.
- The prolonged period of responding to events has seen a well-honed transactional element to Trust leadership. Discussions about the strategic options for the future have brought a transformational element to the discussions, although it has often in the past been driven by transactional concerns and perceived external threats.
- We have made a good start to developing the key processes of Risk Management and Strategic Planning, and now both these processes need to be embedded in the operation of the Trust.
- All plans for improvement and support must continue to be focussed on the single improvement plan to ensure holistic development is a lean and effective process.

### **Strategy**

1. Mitigate the potential impact of a negative KS Ofsted report on RSC intervention in the governance of the Trust, through sustained implementation of improvement priorities outlined in the Academy Improvement Plan.
2. Ensure the Board provides the appropriate support for the continued growth and quality of provision at Studio West as it moves to being an excellent fully subscribed Studio School
3. Ensure that our academies continue to recruit students up to PAN in Year 7 in the light of increased competition from the opening of new schools
4. Ensure the Trust is able to recruit to significant leadership posts (Chair, CEO, CFO and Academy Principal roles) in the Trust and Academies.
5. Develop a growth or merger strategy for the Trust, supported by robust due diligence.
6. Mitigate the impact of COVID-19, including those which are currently unknown

**KSAT STRATEGIC PLAN 2021-24, SECTION 4:  
GOVERNANCE, LEADERSHIP & SUSTAINABILITY OF THE TRUST**

Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG	
<b>Objective 4.1: Mitigate the potential impact of a negative KS Ofsted report</b>						
<ul style="list-style-type: none"> <li>Focus Trust's role on support &amp; challenge to Academy leadership.</li> <li>Support appropriate investment in intervention and collaboration strategies to raise attainment</li> <li>Maintain positive relations with decision makers (RSC, ESFA, LA).</li> <li>Invest in staff and systems to facilitate transformation.</li> </ul>	CEO	July 21	KS SEF indicates that KS is on track to achieve positive Ofsted report	LGB monitors half-termly; CEO reports to Board		
		July 22	KS SEF & external review indicate that KS is on track to achieve positive Ofsted report			
			The RSC & ESFA have approved the Trust's strategic options appraisal			
		July 23	KS SEF & External review indicate that KS is on track to achieve positive Ofsted report		Board reviews	
		July 24	The Trust has been successful in bringing about a transformation in student outcomes		plan termly as standard	
The Board will continue to be the sole strategic decision maker for the schools in the Trust	agenda item.					
<b>Objective 4.2: Ensure the Board provides appropriate support for the continued growth and quality of provision at SW</b>						
<ul style="list-style-type: none"> <li>Submit full business case for further expansion to RSC &amp; ESFA.</li> <li>Focus Trust's role on building capacity of academy leadership.</li> <li>Ensure sixth form provision is planned in collaboration with KS</li> </ul>	CEO	July 21	Full business case submitted to RSC & ESFA. Funding agreement for 650 students approved.	LGB monitors half-termly; CEO reports to Board		
		Oct 21	Sixth form curriculum offer finalised & early signs show post-16 admissions target will be met.			
		July 22	Leadership capacity and succession are strong.		Board reviews termly.	
		Oct 23	Admissions to sixth form meet target.			
		July 23	Sixth form admissions and retention on target.			
		July 24	Studio West is an excellent and fully subscribed studio school of 650 students, including post-16.			
<b>Objective 4.3: Ensure that our academies continue to recruit students up to PAN in Year 7</b>						
<ul style="list-style-type: none"> <li>Continue to strengthen relations with primary schools</li> <li>Review and revise the KSAT marketing strategy</li> <li>Conduct detailed forensic analysis of parental choices including trends</li> <li>Reduce the PAN for Kenton School to 300 for 2023 intake.</li> </ul>	CEO	July 21	Our academies are fully subscribed for Sep	CEO reports to Trust Board		
			Marketing strategy approved by Board			
		Dec 21	Analysis of parental choices conducted & shared			
		July 22	Our academies are fully subscribed for Sep		Trust Board reviews termly	
			KS PAN reduced to 300 for Sep '23			
		Dec 22	Analysis of parental choices conducted & shared			
July 23	Our academies are fully subscribed for Sep					
July 24	Our academies are fully subscribed for Sep					
<b>Objective 4.4: Ensure the Trust is able to recruit high calibre staff to key leadership posts</b>						
<ul style="list-style-type: none"> <li>Produce a bespoke recruitment strategy for hard-to-fill leadership positions in Trust and academies.</li> <li>Review current leadership structures across the Trust, including central services</li> <li>Review KSAT approach to succession planning and intelligence on likely changes.</li> </ul>	HR Manager	July 21	New recruitment strategy approved	Dir of HR reports to F&GP half-termly		
			All key posts filled for Sep with high calibre staff			
		Oct 21	Intelligence shared on likely changes ahead		Trust Board reviews annually	
			Succession plan implemented			
		Review of leadership structures approved				
		July 22	All key posts filled for Sep with high calibre staff			
July 23	All key posts filled for Sep with high calibre staff					
July 24	All key posts filled for Sep with high calibre staff					
Notes:						

Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 4.5: Develop a growth or merger strategy for the Trust, supported by robust due diligence</b>					
<ul style="list-style-type: none"> <li>Support &amp; inform Board discussion on the changing local environment.</li> <li>Commission updated options appraisal for the Trust</li> <li>Hold regular, scheduled strategic discussions on Trust future.</li> </ul>	Chair of Board	July 21	Updated options appraisal commissioned	Trust Board reviews annually	
		Dec 21	Growth/merger strategy approved by Board		
		July 22	Growth/merger strategy confirmed with RSC		
		July 23	Growth strategy reviewed & approved by Board		
		July 24	Board is in a secure position to make informed decisions on the way forward		
<b>Objective 4.6: Mitigate the impact of COVID-19, including those which are currently unknown</b>					
<ul style="list-style-type: none"> <li>Receive regular reports on impact of COVID at all sub-committees, fed back to the full board as a standing item on the agenda.</li> <li>Design and implement appropriate interventions in response</li> </ul>	CEO	July 21	The baseline impact of COVID-19 on attainment and well-being has been evaluated & agreed	CEO reports to Standards Cttee termly.	
		July 22	The impact of COVID-19 on attainment and well-being is at least consistent with national norms.		
		July 23	The impact of COVID-19 on attainment and well-being is at least consistent with national norms.	Board reviews annually	
		July 24	The impact of COVID-19 on attainment and well-being is at least consistent with national norms.		
Notes:					

## Section 5: The Financial Health of the Trust

### Objectives for 2024

- All the requirements of the Academies Financial Handbook (AFH) continue to be met and financial management across the Trust continues to be judged independently as at least good.
- All available resources are used to improve educational provision and student outcomes, by ensuring contracts and value for money are regularly tested.
- A minimum of one twelfth of reserves are maintained and reserves in excess are used to assist with this plan's strategic priorities and investment (capital and revenue) required to ensure the Trust meets all its legal and statutory obligations.

### Where are we now?

- The Trust has achieved the level of reserves required by the ESFA by 31 August 2020.
- The Trust adheres to all the requirements outlined within the Academies Financial Handbook – as confirmed by the external auditors and internal assurance visits.
- The Trust has received substantial assurance on the basis of the internal assurance visits for the 2019-20 financial year.
- The Trust has in place planned procurements to test value for money for existing contracts.
- The Trust has fully implemented Integrated Curriculum and Financial Planning (ICFP) and has a three year budget-planning cycle.

### Strategy

- Maintain the three-year budget planning cycle and rigorous ICFP on an annual basis.
- Ensure contracts and value for money are regularly tested.
- Use these tools to ensure there are sufficient resources to deliver the required services and plan accordingly for student growth.
- Review and approve, on an annual basis, the contribution to be made from reserves to the agreed strategic spending priorities for the Trust
- Maximise income generation by fully utilising all our facilities

KSAT STRATEGIC PLAN 2021-24: SECTION 5: THE FINANCIAL HEALTH OF THE TRUST					
Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG
<b>Objective 5.1: All legal and statutory obligations, &amp; the requirements of the Academies Financial Handbook are met</b>					
<ul style="list-style-type: none"> <li>• Review each update of the AFH and ensure all changes are implemented</li> <li>• Review Academies Accounts Direction and implement any changes</li> </ul>	DoF	July 21	Internal assurance & scrutiny programme and annual audit provide substantial assurance	F&GP Committee monitor half-termly.  Board reviews annually.	
		July 22	Internal assurance & scrutiny programme and annual audit provide substantial assurance		
		July 23	Internal assurance & scrutiny programme and annual audit provide substantial assurance		
		July 24	Internal assurance & scrutiny programme and annual audit provide substantial assurance		
<b>Notes:</b>					

Strategy	Lead	Timeline	Success Criteria	Monitoring & Evaluation	RAG			
<b>Objective 5.2: Value for money is assured and all available resources are used to improve educational outcomes</b>								
<ul style="list-style-type: none"> <li>Ensure contracts and value for money are regularly tested.</li> <li>Maintain the three-year budget planning cycle and apply rigorous ICFP on an annual basis.</li> </ul>	DoF	July 21	All ESFA reports and submissions are approved, completed and submitted on time	F&GP Committee monitor half-termly.  Board reviews annually.				
			Ongoing procurement programme shows value for money v DfE benchmarks					
		July 22	All ESFA reports and submissions are approved, completed and submitted on time					
			Ongoing procurement programme shows value for money v DfE benchmarks					
		July 23	All ESFA reports and submissions are approved, completed and submitted on time					
			Ongoing procurement programme shows value for money v DfE benchmarks					
		July 24	All ESFA reports and submissions are approved, completed and submitted on time					
			Ongoing procurement programme shows value for money v DfE benchmarks					
		<b>Objective 5.3: The required reserves are maintained and any excess is used to fund the agreed priorities of the Trust</b>						
		<ul style="list-style-type: none"> <li>Review and approve, on an annual basis, the contribution to be made from reserves to the Trust's agreed strategic spending priorities</li> <li>Maximise income generation through KS lettings</li> <li>Reserves policy reviewed annually</li> </ul>	DoF		July 21	Total income from sports and other lettings has increased from last year	F&GP Committee monitor half-termly.  Board reviews annually.	
						Reserves maintained as required by ESFA		
						Any excess in reserves has been spent according to strategic priorities		
July 22	Total income from sports and other lettings has increased from last year							
	Reserves maintained as required by ESFA							
	Any excess in reserves has been spent according to strategic priorities							
	Pension contribution reviewed and provision made for possible increase in 2023							
July 23	Total income from sports and other lettings has increased from last year							
	Reserves maintained as required by ESFA							
	Any excess in reserves has been spent according to strategic priorities							
July 24	Total income from sports and other lettings has increased from last year							
	Reserves maintained as required by ESFA							
	Any excess in reserves has been spent according to strategic priorities							
<b>Notes:</b>								