

**MEMORANDUM OF UNDERSTANDING**

***Working together for outstanding education***

**A MULTI ACADEMY TRUST PARTNERSHIP BETWEEN**

**Sherborne Abbey CofE VC  
Primary School**



**Buckland Newton CofE VC  
Primary School**

**Sherborne Learning Centre**



**Sherborne Primary School**

**St Mary's CofE VC Primary  
School, Bradford Abbas**



**St Andrew's CofE VC  
Primary School, Yetminster**

**Thornford CofE VA Primary  
School**



**The Gryphon School**

**DATED – 28 JUNE 2016**

**PURPOSE OF THE MEMORANDUM OF UNDERSTANDING (MOU)**

The above named schools have agreed to develop an education partnership based on a Multi-Academy-Trust (MAT) model. The primary objective of the partnership is to secure the highest possible quality of education for all the children in our community.

This MOU summarises the key elements and principles of the proposed partnership as agreed between the partner schools. It is intended to be used to set the framework and guidelines within which the Project Steering and Interim Board (PSIB) will work together to establish the new Multi-Academy-Trust on behalf of the schools involved.

The MOU is not intended to be a legally binding document but rather a valuable tool in setting the guidelines for how the partnership will work. For the avoidance of doubt, any of the parties to this MOU may elect for any reason and at any time until the formal agreement on the MAT is executed to opt out of the proposed MAT, and in particular the PSIB. In such cases no other party to this MOU shall be entitled to any compensation or other remedy from the party so electing to opt out, and the party electing to opt out shall not be entitled to any compensation or other remedy from the other parties.

The specific Governance and Operational arrangements for the new MAT will be agreed between the partner schools during the development of the partnership and will be formalised within the legal constructs of the MAT model articles.

### PARTNERSHIP NAME

- 1.1. The name of the partnership will be the – **Sherborne Area Schools' Trust**

### PARTNERSHIP PURPOSE AND GOALS (MISSION/VISION STATEMENT)

- 1.1. Our MAT will be a special collaboration of high performing primary, secondary and alternative provision schools seeking to ensure an excellent and sustainable 0-18 education for children within our community across West and North Dorset.
- 1.2. We will build upon the existing good relationships across the Sherborne schools partnership and the Sherborne small schools cluster and develop as a family of schools working together to strengthen each school and inspire our young people and their families.
- 1.3. All schools within our MAT have a shared commitment to creative and innovative learning opportunities, high aspirations and leadership, and academic success within inspiring schools, alongside developing the personal attributes for everyone (children and staff) to thrive at every stage of their learning journey.

### UNDERLYING PRINCIPLES OF THE PARTNERSHIP (ETHOS & CULTURE)

- 1.4. Our partnership is an inclusive learning community in which children and adults together are committed to learning; inspired by a love of lifelong learning. The partnership focus is to enhance the whole of a child's learning journey from 0-18 and it also promotes learning amongst adult members of school communities and the families of pupils.
- 1.5. All schools in the MAT are equal partners and are committed to the principles of collaboration, sharing expertise and resources to enable all partner schools to deliver excellent education for all young people in their care.
- 1.6. Opportunities for greater consistency and coherence will be actively sought for the benefit of all children and staff.
- 1.7. The partnership model will celebrate each schools unique and individual characteristics in the community it serves. Each school will retain its individual identity, uniform, ethos and where relevant Christian distinctiveness but will be working together for the benefit of the children, families and communities that they serve.
- 1.8. Each school will continue to have its own local governing group and will have the earned autonomy\* to develop its provision so that it meets the needs of all its pupils and their families. Our MAT will give Headteachers\* a high degree of autonomy, alongside support and challenge in leading their schools, and will encourage them to focus on teaching and learning.
- 1.9. There will be a rigorous focus on the key areas for improvement in order to achieve the highest standards of academic and personal achievement - nurturing our students' spiritual, moral, social, physical and cultural development. The MAT will recognise, prepare for and act upon the national and local changes taking place across education and that face the partnership trust.
- 1.10. The leadership will act impartially in the best interest of the trust and will work in the best interest of all the academies.
- 1.11. Our MAT recognises and will where possible pre-empt issues of performance (educational, financial, compliance etc). Where a school is experiencing or at risk of experiencing issues, our MAT will take the appropriate action to support the school to resolve those issues in a timely manner and for the benefit of those within the MAT.
- 1.12. Our partner schools value all of our staff and the contribution they bring to our schools and for our young people. All partner schools are committed to supporting the development of all staff, to foster leadership and succession planning and to offer staff greater opportunities within the MAT and its academies; and we will engage with our staff in shaping the provision across the MAT.

### STRUCTURAL CONCEPT – MODEL / GOVERNANCE / ACCOUNTABILITIES

- 1.13. The partner schools have agreed that a Multi-Academy-Trust is the most appropriate legal structure for our partnership.
- 1.14. The governance of our MAT is structured to support the foundation governor requirements of voluntary controlled, community schools and voluntary aided schools.

- 1.15. The Sherborne Schools Trust will be a MAT of significant scale with almost 3000 students and 450 staff. As such the partnership will work strategically for the benefit of all within the partnership but develop a model that recognises the local communities that the schools serve.
- 1.16. The MAT and its schools will continually evaluate, improve and develop through strong, effective and accountable leadership at all levels. The aim is to establish clear and simple but effective accountability including slim and streamlined governance.
- 1.17. Members and Trustees will be selected for their strategic vision, integrity and skills. Where the required skills are not readily available from the existing governing bodies the Trust will actively look to the wider community and business for the skills.
- 1.18. The MAT will have a governance structure of 3 core levels :-
- **Members:-** Members are like the shareholders in a commercial company, they appoint the Trustees to run the MAT, and are the only people able to amend the Articles of Association of the MAT. There will be between 4 and 6 members of which 1 will be the Diocese of Salisbury in a corporate capacity and at least 1 other will be of foundation status. The aim would be for one of the members to be a National Leader of Education and this person would also be a Trustee. Members will have strategic vision, collectively will have a range of skills such as academic/education, financial, legal, corporate business and creative/cultural. Members may not have had previous links to the MAT.
  - **Board of Trustees:-** Trustees are those people who actually run, determine policy, and make decisions for the MAT. They are the statutory Governing Body of each School within the MAT. There will be between 10-12 trustees including a minimum of 4 (up to 50%) with foundation status. The Trustees will be appointed on the basis of the skills balance required for the MAT including finance, legal, HR, project/business management, education, estates. The CEO will be a Trustee.
  - **Local Governance:-** Within the shared vision of our MAT each school will retain a Local Governing Group with agreed delegation to respond to the context, status, needs and resources of its school community and its connections to the wider world. The Local Governing Group will focus on teaching and learning, standards and achievement, community and safeguarding. There will be up to 10 local governors in each school and each Local Governing Group will be established to reflect its VC, VA or community status. There will be **no local level sub-committees**.
- 1.19. The Board of Trustees will have central Trust Committees for Student Achievement and Teaching, Finance, Resources and Audit as well as Staffing/HR/Appraisal. Core policies will be produced for all schools in the MAT at Trust Board level.
- 1.20. All schools within our MAT will be accountable to the Board of Trustees for standards and achievement.
- 1.21. The MAT will develop a delegation model that will be decided by the Board of Trustees and based upon the assumption of high delegation and autonomy to each school but with the ability to adjust this based on triggers of concern (TBA - educational / financial / sustainable / compliance).
- 1.22. The MAT will have an operational management structure to lead and support its aspirations. This will include a CEO and a Financial Director role (as required by the Academies Financial Handbook) who will be appointed by the Board of Trustees through an open and transparent appointment process.
- The operational leadership structure needs to be finalised by the Steering Group who will take advice from specialist HR advisors and after taking into consideration the precise accountability, job specification, time commitment and expected impact of the leadership group.
  - The CEO will be directly accountable to, and performance managed by, the Board of Trustees
  - Headteachers performance management and appraisal will be undertaken via their Local Governing Bodies within the involvement of the CEO.
  - The schools forming the MAT acknowledge that the MAT is a single employer and as such the MAT will operate a single payroll and establish appropriate HR policies.

- 1.23. The Trust leadership structure will be designed to ensure the highest levels of experience and expertise to lead an outstanding MAT. Affordability is an important factor in establishing the central operational leadership so that it adds value and does not draw funds away from teaching and learning.

### DIOCESAN RELATIONSHIP AND RELATIONSHIPS TO EXISTING PARTNERS

- 1.24. The MAT will be outward looking, actively pursuing partnerships and relationships which will bring the highest quality of provision, services, CPD and opportunities that contribute to improved outcomes for all our schools and children.
- 1.25. The MAT will ensure that all church schools will continue their distinct character and active engagement with the Diocese of Salisbury, and that all community non Church schools will retain their character and ethos. The Board of Trustees will have appropriate representation from the Diocese.
- 1.26. The schools within the MAT value their established relationships with other partners and will engage with these existing partners whilst ensuring that the underlying ethos/culture of the MAT is maintained. The MAT will ensure that the partnership that exists between the Sherborne small schools cluster and the Sherborne Schools Partnership will continue regardless of membership of the MAT.
- 1.27. The MAT recognises the importance of the primary schools' discreet relationships with their local pre-schools and nurseries and of the Learning Centre's unique relationships with the wider schools with which it operates. These are critical relationships which the MAT aims to enhance, develop, and strengthen.
- 1.28. New partners will be considered on a case by case basis in terms of the benefits they will bring to our MAT as well as an individual school.

### SUPPORT SERVICES AND FINANCIAL MANAGEMENT

- 1.29. We recognise that the partnership as a single legal entity will be responsible for a revenue funding value of ca. £15million and that appropriate skills will be required at partnership leadership governance and operational levels.
- 1.30. The MAT will establish effective financial management of the company and its schools and determine the financial delegations within the governance and operations model. The member schools recognise the requirements of the Academies Financial Handbook and will design our operational and governance leadership to reflect these requirements.
- 1.31. Our MAT aims to operate in a financially efficient way adopting shared services, including procurement opportunities, to deliver benefits for all schools.
- 1.32. The MAT will seek to preserve and protect the financial sustainability of all schools in their current locations.
- 1.33. The MAT acknowledges that some schools have different and essential funding streams that will require careful consideration and planning within the financial delegation framework.
- 1.34. An agreed proportion of each school's budget will be held centrally and used to fund partnership priorities and centrally delivered services that provide efficiencies across the schools.
- 1.35. The partnership will develop a 3/5 year business and financial plan that will be owned by the partnership Board and managed by the lead executive and the appropriate delegations.
- 1.36. A fair and equitable means of accessing external funds for schools within the MAT will be established through a central grant application process with an appeal system in place.
- 1.37. Parent Teacher/Friends Association (PTA) funds will be retained by the individual schools for their own use.
- 1.38. From the point of conversion individual schools in our MAT will roll forward with their existing balances whether surplus or deficit.
- 1.39. Conditions and suitability surveys for each school will be part of the academy conversion process and a requirement for any school wishing to join our MAT in the future.

## GROWTH AND DEVELOPMENT

- 1.40. The MAT is distinctive in its locality and therefore initially it is for Sherborne Schools Partnership schools. Growth beyond this would only be considered if there were significant benefits to the schools in the MAT. Beyond the Sherborne schools partnership group preference will be given to schools that are within the localities that border with the Sherborne area.
- 1.41. The partnership is open to enquiries from all schools of any or no faith and of any age range. The shared values and vision is critical to the success of the partnership and schools wishing to join will be expected to buy into and demonstrate commitment to them.
- 1.42. The schools within the MAT recognise their moral duty to support other schools. All schools expressing an interest in joining the MAT will be subject to a due-diligence evaluation in order that the MAT understands the contribution the school would make to the MAT and the support needs of the school. This is effective capacity management.
- 1.43. The partnership is keen that when the time is right, and the schools can demonstrate capacity and expertise they will explore Teaching School Alliance status, Academy Sponsor status and other similar opportunities.
- 1.44. The partnership members recognise the importance of being financially sustainable while delivering the education outcomes. The leadership of the partnership will therefore continually monitor the financial position of the partnership and explore opportunities for outward growth when benefits can be achieved.

## DEVELOPMENT PROCESS & TIMESCALES

- 1.45. A Project Steering Group and Interim Board will be established to lead the development of the MAT. It will have a clear Terms of Reference and a Chair will be elected. The Steering Group will establish committee work-streams with delegated responsibility to lead and develop the specifics of the MAT. These work-streams are anticipated to be: Finance & Contracts / Education / Legal / Governance / Stakeholder / Operations & Staffing/TUPE et al.
- 1.46. The Project Steering Group will be made up of 2 representatives from each school with a mix of HT and Governor representation.
- 1.47. A detailed project plan will be established and all member schools will work within the timeline and plans. Where a school is unable to meet the agreed timescales the Steering Group will look to support them in a later conversion.
- 1.48. Academy conversion applications will only be submitted once the schools progressing together into the MAT have been agreed and signed up to this MOU.
- 1.49. The members are working towards agreement to this MOU by mid February 2016, securing academy orders during Summer Term 2016 and establishing the MAT and conversion of their schools into academies by February 2017.
- 1.50. Appropriate external support and services will be secured for the development of the MAT where these are not readily available to be released from a member school. It is envisaged these will include: Project Management; Legal Advisors; Financial Advisors/Accountants; Buildings and Land specialists; HR and TUPE specialists et al.
- 1.51. External Consultant support will be considered to support the Steering group and the next stages of the project.
- 1.52. Within each school a Sub-Committee of 3 will be set up to act as the conversion group for each school.
- 1.53. In order to finance the development of the MAT and the costs of the conversion programme, all schools within our MAT will pool an agreed level of initial funds along with a proportion of academy based grant monies into one member school which will act as the lead commercial school for securing the required external support services.

## STAKEHOLDER ENGAGEMENT APPROACH

- 1.54. The partnership will develop a consistency of approach for engaging with its stakeholders.

- 1.55. All correspondence and information to stakeholders will be carefully co-ordinated so that the same message is given at the same time by all schools to demonstrate a united approach and commitment to the initiative. This includes common letters being used at the same time.
- 1.56. A detailed plan will be developed to oversee and manage communications and consultation and this will be closely aligned to any legal consultation requirements.
- 1.57. The MAT recognises the importance of effective consultation and the timing of this: too early and the schools will be unable to effectively respond to stakeholders queries, too late and stakeholders will feel unable to contribute. The MAT will therefore issue communications and undertake informal consultation prior to the academy orders being received. Formal consultation will take place once the details of the MAT model are more firmly defined, the DfE and the Diocese have been consulted and the academy orders have been received. This enables the schools to consult on the basis of a formulated forward plan and so be more able to respond to stakeholders queries.
- 1.58. Feedback and reporting the outcomes of the consultation process will form part of the plans.

### Definitions

\*1.8 "Earned autonomy" refers to the position whereby organisations or individuals who are successful have greater freedom to continue the effective practices which have led to that success. The level of intervention and support is inversely proportional to the effectiveness of the school.

\*1.8 "Headteacher" refers to the head or lead of each school or centre

**MEMBER SCHOOLS**

The following schools have committed to engaging in and forming **The Sherborne Schools Trust** based on the principles and key information described within this MOU.

<p>For and on behalf of <b><u>THE GRYPHON SCHOOL</u></b></p> <p>SIGNED by ..... (The Gryphon School Chair of Governors - Print Name)</p> <p>..... (Signature - Chair of Governors)</p> <p>Date .....</p> <p>SIGNED by ..... (The Gryphon School Head Teacher- Print Name)</p> <p>..... (Signature – Head Teacher)</p> <p>Date .....</p>	<p>For and on behalf of <b><u>BUCKLAND NEWTON COFE VC SCHOOL</u></b></p> <p>SIGNED by ..... (Buckland Newton CofE School Chair of Governors - Print Name)</p> <p>..... (Signature - Chair of Governors)</p> <p>Date .....</p> <p>SIGNED by ..... (Buckland Newton CofE School Head Teacher- Print Name)</p> <p>..... (Signature – Head Teacher)</p> <p>Date .....</p>
<p>For and on behalf of <b><u>SHERBORNE ABBEY COFE VC PRIMARY SCHOOL</u></b></p> <p>SIGNED by ..... (Sherborne Abbey CofE VC Primary School Chair of Governors - Print Name)</p> <p>..... (Signature - Chair of Governors)</p> <p>Date .....</p> <p>SIGNED by ..... (Sherborne Abbey CofE VC Primary School Head Teacher- Print Name)</p> <p>..... (Signature – Head Teacher)</p> <p>Date .....</p>	<p>For and on behalf of <b><u>SHERBORNE LEARNING CENTRE</u></b></p> <p>SIGNED by ..... (Sherborne Learning Centre Chair of Governors - Print Name)</p> <p>..... (Signature - Chair of Governors)</p> <p>Date .....</p> <p>SIGNED by ..... (Sherborne Learning Centre Head Teacher- Print Name)</p> <p>..... (Signature – Head Teacher)</p> <p>Date .....</p>

For and on behalf of SHERBORNE PRIMARY SCHOOL

SIGNED by .....  
(Sherborne Primary School  
Chair of Governors - Print Name)

.....  
(Signature - Chair of Governors)

Date .....

SIGNED by .....  
(Sherborne Primary School  
Head Teacher- Print Name)

.....  
(Signature – Head Teacher)

Date .....

For and on behalf of ST ANDREW'S COFE PRIMARY SCHOOL, YETMINSTER

SIGNED by .....  
(St Andrew's CofE Primary School, Yetminster  
Chair of Governors - Print Name)

.....  
(Signature - Chair of Governors)

Date .....

SIGNED by .....  
(St Andrew's CofE Primary School, Yetminster  
Head Teacher- Print Name)

.....  
(Signature – Head Teacher)

Date .....

For and on behalf of ST MARY'S COFE VC PRIMARY SCHOOL, BRADFORD ABBAS

SIGNED by .....  
(St Mary's CofE VC Primary School, Bradford Abbas  
Chair of Governors - Print Name)

.....  
(Signature - Chair of Governors)

Date .....

SIGNED by .....  
(St Mary's CofE VC Primary School, Bradford Abbas  
Head Teacher- Print Name)

.....  
(Signature – Head Teacher)

Date .....

For and on behalf of THORNFORD COFE VA PRIMARY SCHOOL

SIGNED by .....  
(Thornford CofE VA Primary School  
Chair of Governors - Print Name)

.....  
(Signature - Chair of Governors)

Date .....

SIGNED by .....  
(Thornford CofE VA Primary School  
Head Teacher- Print Name)

.....  
(Signature – Head Teacher)

Date .....



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**APPENDIX A – SALISBURY DIOCESE VARIATION E STRUCTURAL MODEL**

The following model variation is proposed as the starting point from which the Trust will develop its governance and operational model.

