



LYDIATE
LEARNING
TRUST

ENGAGE, ENABLE,
EMPOWER

"We engage with all within our Trust and beyond to enable them to show the world their particular strengths, their ideas and their passion"

Strategic Plan

2021/22 – 2024/25

(Updated January 2022)

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<http://lydiatelearningtrust.co.uk/>



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Welcome to Lydiate Learning Trust



Welcome to Lydiate Learning Trust. It is my pleasure to write the forward to our 2021-2025 Strategic Plan which sets out our vision and values and how we intend to achieve our aims.

We came together initially as a Multi-Academy Trust in 2015 to further develop our family of schools and share leadership experience.

We believe that the development and sharing of best practice is the very best way to achieve what we set out to do. We believe that when children attend school, they arrive with a personal aim to succeed, to be encouraged to develop as an individual and to enjoy their learning building memories and friends they will cherish forever. They want to do well, and parents want that too. We need to help fulfil this purpose.

We are also unique in that we have a very successful SCITT where our intention is to develop the outstanding teachers of tomorrow. Our schools and training centre share the same vision of 'Engage, Enable, Empower'.

This strategic plan explains our aims and objectives and illustrates the services that we offer to our schools and those wishing to work with us.

A handwritten signature in purple ink, likely belonging to John Graham, the Chair of the Lydiate Learning Trust Board of Directors.

John Graham
Chair of the Lydiate learning Trust Board of Directors

Part 1

Our Vision

The Trust has a clear, embedded vision, shared with all which is used to identify key decisions.

Why is this important?

A 'vision' is a clear statement of what LLT is trying to achieve so that all stakeholders – teachers, students, families, community members, Governors, Directors, Trustees etc. are working together. It is about looking forward and seeking to motivate and unify everyone to achieve the very best for the students in our care. The vision needs to capture the aims of a Trust in its context, guide and inform the preparation of all the development plans.

A vision is important for Trusts and the schools within the Trust (*West-Burnham 2010*) because it:

- Provides the focus for all aspects of organisation life
- Informs planning and the development of policies
- Clarifies and prioritises the work of individuals
- Helps to articulate shared beliefs and develop a common language thereby securing alignment and effective communication.
- Characterises the organisation to the rest of the world

Engage, Enable, Empower

"We engage with all within our Trust and beyond to enable them to show the world their particular strengths, their ideas and their passion"

We do this by...

- 1) Empowering individuals through learning
- 2) Fostering a "can-do" attitude that leads to continuous improvement
- 3) Producing confident young adults with high levels of perseverance, proficiency, and integrity
- 4) Encouraging families and our schools to work together to support student learning
- 5) Providing a happy, safe, supportive environment where students can learn effectively
- 6) Developing the whole child with a comprehensive offer of wider curriculum
- 7) Engaging with our students to inspire, contribute and care
- 8) Developing leadership at all levels for Students, Staff, Governors, and our Communities
- 9) Promoting an enterprise culture that creates close working partnerships with business and wider partners
- 10) Committing to having honest conversations about our strengths and our opportunities for growth

Engage, Enable, Empower

Respect for Others - Show respect for and value all individuals for their diverse background, experiences, styles, approaches, ideas, and beliefs.

Trust – We build trust through responsible actions and honesty.

Personal Accountability – Take personal accountability for behaviour, actions, words, and results.

Solution Focussed – Focus on finding solutions and achieving great things.

Can Do Attitude - Adopt a determined attitude and work hard to get the job done.

Collaboration – We achieve more when we work together, support each other, and collaborate.

Commitment to Self and Others – Personal commitment to success and wellbeing of others in your class or your team.

Resilience - We strive harder and are more determined to overcome challenges.

Pride – Be proud of being part of “Team Lydiate”, celebrating your own and others success.

Communication – Communicate effectively and listen to one another for understanding and compassion.

The role we play as a sponsor

The Trust believes the role of the sponsor is one of improving attainment and progress in the sponsored school and they also believe every school should contribute to school improvement using their strengths to do so.

The Trust aims to provide:

- Strategies to empower individuals through learning and the fostering of a “can do attitude” supported by OLEVI teaching, learning, and coaching
- Support to leadership at all levels
- Quality first teaching of the highest standard
- Individual targeted support at all levels for everyone
- A well-thought out and deliberately planned curriculum
- Access to a range of employers at global, national, regional, and local level to support ICAG, the curriculum and teaching and learning
- A range of extra-curricular opportunities that enhance the curriculum and broaden horizons whilst further enhancing skill development and leadership
- Access to a range of quality trainees, through our own teacher training centre and effective development planning to allow for the foundations of effective succession planning
- Targeted CPD closely linked to school improvement
- Effective management of HR, finances, and back-office functions

Our Context

Lydiate Learning Trust was established at the beginning of 2015 when Deyes High School was approached to sponsor Childwall Sports and Science Academy. A relationship that stemmed from the sharing of good practice across the schools in leadership, curriculum development and teaching and learning.

At the same time, Deyes High School had submitted a bid to the DfE to develop a new Studio School (Studio@Deyes) and to open a new teacher training centre (AMP). This was borne from a longstanding tradition in two areas of strength and expertise... in relation to the Studio, that of ICAG and Employer Engagement, and in relation to AMP, teacher training and provision of CPD.

Alongside its improvement work in its current academies, Lydiate Learning Trust also works actively to support other schools on a smaller scale e.g., currently the Lead Practitioners in Maths are working alongside the local Maths hub, focusing on Maths mastery and the project led by them across many schools. The benefits here are obviously two-way and the Lead Practitioners bring a wealth of expertise back to LLT Schools.

Our Leaders also actively work across schools delivering the Rainbow Trust Teaching Hub stand for ITT, MPQSL, NPQSL, NPQH and some of our in-house leadership courses. We are active members of the Hub and contribute to its development. The Executive Leaders are also active members of the Forum CEO, CST network and the area wide MAT learning set. Within the Trust we have several Lead Practitioners in Maths, English and Science, many Expert Practitioners, SLE's, "Chartered" College mentors and an LLE. We actively work with the Chartered College and the local research school. We currently have 2 ELE's.

The Trust is keen to work with the Regional Schools' Commissioner (RSC) and to grow its family of academies. This will enable a greater level of system-led improvements, further collaboration and leadership development at all levels and better economies of scale. All of which, we believe improves the life chances of youngsters. Ultimately, and most importantly, this will lead to a better offer for our children locally, regionally, and beyond.

We fundamentally believe we offer an opportunity to schools to convert to Academy in a way that is supportive and accommodating and which removes any concern

- Individual schools that can thrive in their own context and in line with their own identity and community.
- Schools that are committed to maintaining their distinctiveness.
- A dynamic collaboration, working with a whole range of partners, to deliver tailored programmes of school improvement.
- A focus on teaching and learning leading to school improvement whilst other professionals focus on academy business.
- The flexibility to meet schools where they are at on their journey to improvement.
- An agreed scheme of delegation.

Leadership and Governance

Leadership and developing leaders are particularly important to Lydiate Learning Trust and very important in all our schools. A flavour of what we provide is listed below.

- 1) A leadership element to support learning in our schools
- 2) A well-developed ITT programme through our very own AMP SCITT
- 3) A robust NQT programme that builds on the foundations of the SCITT.
- 4) Aspirant leaders' programmes at middle and senior leadership.
- 5) Deliver in-house MPQML, NPQSL & NPQH in partnership with accredited providers.
- 6) Our own leadership standards.
- 7) Robust Governance training programmes.
- 8) Support for new leaders at every level.

It is important to us that our leaders are supported and challenged by a secure model of governance and trusteeship.

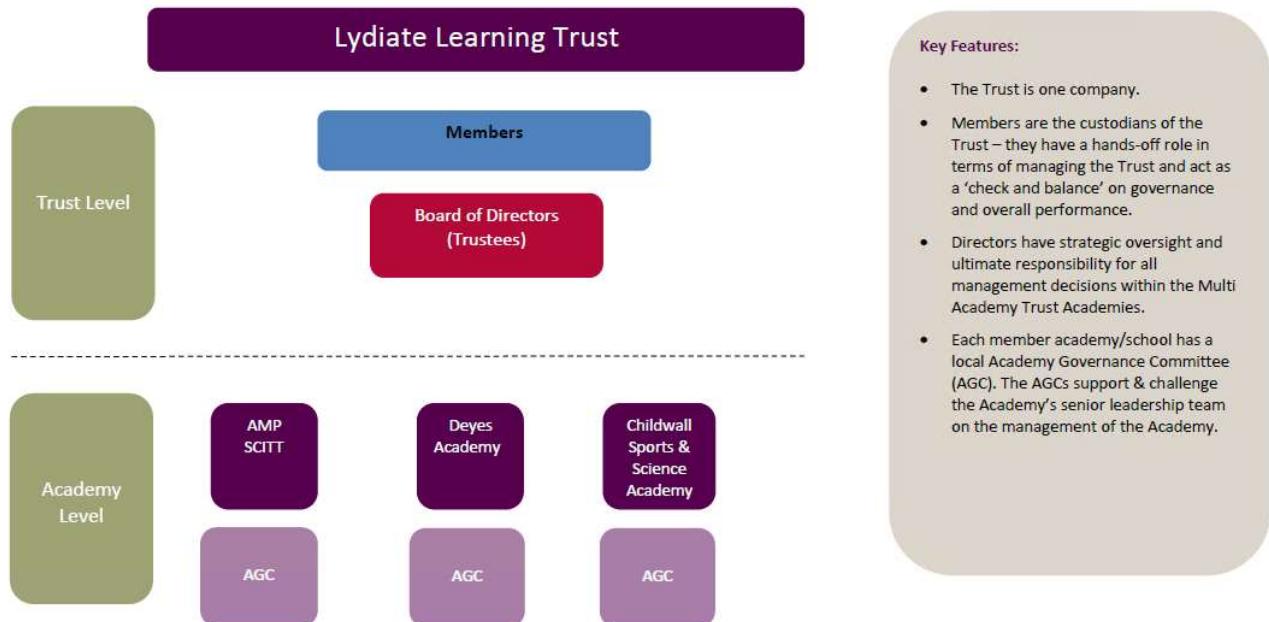
Articles of Association

In accordance with Academy requirements the Multi-Academy Trust follows the Articles of Association prescribed by the DfE.

Scheme of Delegation

Our Scheme of Delegation sets out the responsibilities and accountability at every level of the organisation. This can be found at www.lydiatelearning.org. This means that the Academy Governance Committees are responsible for the Governance of their school under the guidance of a Board appointed Chairperson and subject to the scheme of delegation. The Board of Trustees, do, however, reserve the right to intervene where governance falls below acceptable standards. New Academy Governance Committees will have the support of the CEO, an Executive Member, and a Professional Governance Leader.

Trust Governance Structure



Personnel

2021/22



Executive Team

2021/22



How do we support other schools?

We are committed to engaging with all within our Trust and beyond to enable them to show the world their talents. This is firmly rooted in the fundamental belief that every child deserves the same chances in life and that includes the right to a good education.

To support on our journey to outstanding, we provide a range of core services, support, and challenge.

However, it is also essential that any school that wants to work within Lydiate Learning Trust recognises their own strengths and are keen to share them. We aim to foster a culture of collaboration. We value the culture, ethos and journey of any school joining us, regardless of starting point, and we plan a journey of perseverance going forward together.

On introduction to Lydiate Learning Trust we evaluate strengths and areas for development covering all angles of “due diligence”. This audit will be a collaborative approach. We work on the improvement foci together, plan together and review impact together. Our Academies have a strong commitment to one another and work together to achieve success.

However, to effectively target resource, we use the school improvement model (overleaf) to ensure accurate, timely support is quickly directed where needed.

Stronger schools looking to join us would contribute to the diagnostic phase, share best practice, and develop together.

Vision into Practice

We believe that schools that are open and honest about their strengths and weaknesses have the very best chance of moving forward. If the self-evaluation processes are robust, accurate and provide a roadmap for improvement these schools can turn weaknesses into strengths.

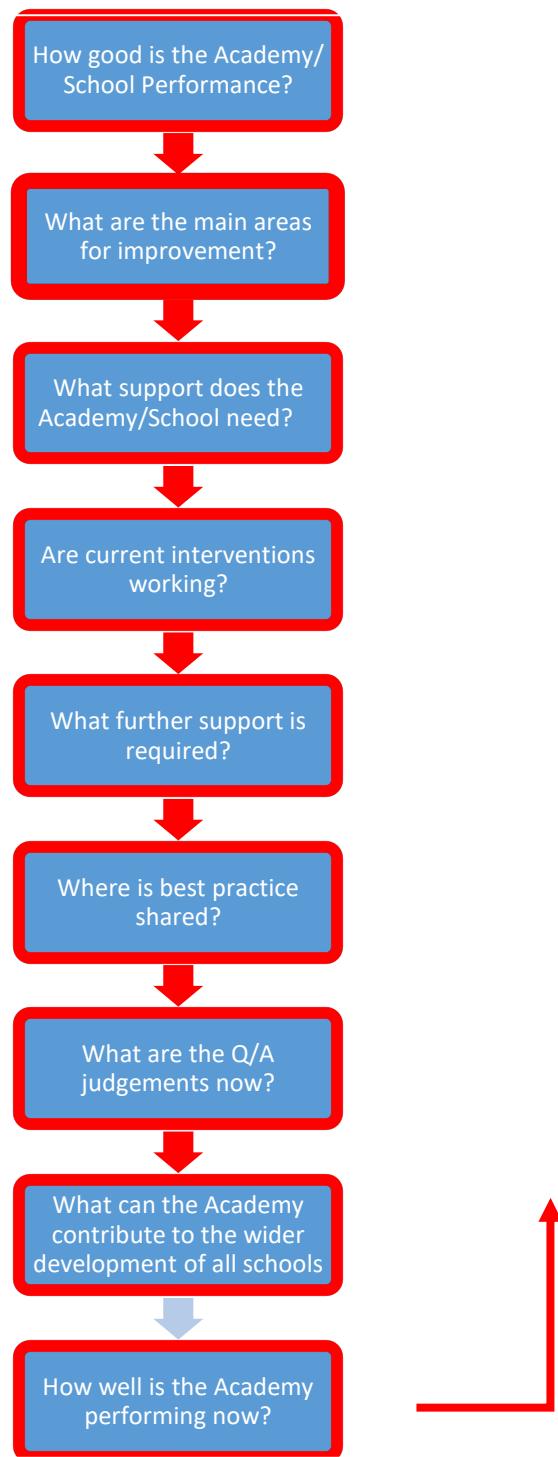
Working with LLT through:

- 1) Embracing reviews conducted both internally and externally
- 2) Critically analysing comparative data
- 3) Sharing best practice
- 4) Planning improvement

Academies/schools have access to a raft of experiences and resources that will develop the knowledge skills and values needed to see the required improvement across all areas of the school. We also believe that each Academy/School is unique, and we appreciate that trust and strong partnerships are at the centre of school improvement. We recognise that our academies/Schools need many different partnerships to support improvement. We use a simple model to guide schools to success.

Improvement Model

Diagram 1



Using the Academy/School Improvement Model Academies/Schools engage at varying degrees of collaboration. This will be agreed and determined at the outset when a full review of the school is conducted with the Governance and Senior Team.

Our model, that forms the basis for this review, is seen attached (school review document overleaf diagram 2). This review allows schools to engage with the Trust at one of three levels. We do, however, find that schools quickly move across the stages (see levels of engagement for school's diagram 3).

School Review Document

This document is completed with the relevant school leaders and Governors (as appropriate).

Diagram 2

| Areas for focus | Key questions |
|---|---|
| 1) OFSTED | <ul style="list-style-type: none"> - What does your last OFSTED report tell you about the school's strengths and weaknesses? |
| 2) FINANCIAL HEALTH AND EFFICIENCY | <ul style="list-style-type: none"> - What is the current budget position? - Are you projecting a deficit? - What has contributed to any deficit e.g., falling rolls? - How does the leadership team ensure the school is maximising the use of its resources to drive pupil outcomes? - How often do you review metrics and benchmarking? - How do you compare to similar schools re benchmarking? - Are you building reserves over and above what is necessary for contingency? |
| 3) GOVERNANCE | <ul style="list-style-type: none"> - Does governance effectively hold senior leadership to account for performance and financial management, and know how to provide effective challenge? - Does the Board comprise of a suitable range of skills, as outlined in the DfE's Governors' Competence Framework and the Governance handbook? Has a skills audit of governors been completed? - Are lines of accountability and a scheme of delegation clearly articulated? |
| 4) CURRICULUM | <ul style="list-style-type: none"> - Does the school offer a broad and balanced curriculum but have a focus on core subjects (English and Maths)? - What is the intent, implementation, and impact? - Is your curriculum planning linked with your financial planning? (See financial health and efficiency section above) |
| 5) STAFFING | <ul style="list-style-type: none"> - What are the key issues relating to staff numbers and performance? What is the level of staff turnover and absence by subject or year group? - How is the performance of staff monitored? - What are your staff development priorities? - What is the capacity to tackle the problems identified? |
| 6) PARENT & WIDER COMMUNITY | <ul style="list-style-type: none"> - How does the school work with and engage parents? - Does the school have a PTA/school council? - How well do parents get involved in their child's learning? Are they helped and encouraged to do this? - How else do you encourage parental involvement? |
| 7) VISION | <ul style="list-style-type: none"> - Does the school have a clear vision? Is it relevant and concise? Does it encapsulate where the school aims to be? - Is everyone (pupils, staff, parents, governors) aware of the school's vision? Is the vision apparent from the way the school operates? Is it constantly referred to? - Are the school's culture and ethos clear? Is it consistent with the vision? Is everyone (pupils, staff, parents, governors) aware of them? Is the culture and ethos apparent from the way the school operates? Are they constantly referred to? - Have you identified relevant partners who share or back your vision, and who could help to disseminate and support its achievement? |

| Areas for focus | Key questions |
|-------------------------------|---|
| 8) CORE LEADERSHIP | <ul style="list-style-type: none"> - How can you ensure the right people with the right skills are in the right jobs? Are you clear about the skills you need in your team? Do you need to do a skills audit to find out whether all the necessary skills are present? - How will you strike the balance between recruiting new leaders and keeping and developing those with talent within the school? - How will you build resilience in senior leaders? How will you ensure they have effective management and communication skills? - How are the current SLT held to account? Are there ways in which this could be done better? - How effectively does the SLT work together? Are there things that could be improved? |
| 9) MIDDLE LEADERSHIP | <ul style="list-style-type: none"> - How will you empower your middle leaders? When will you start to plan for this? - How will you build a sense of ownership with the necessary accountability? |
| 10) BEHAVIOUR | <ul style="list-style-type: none"> - Has the school set clear expectations for pupils' behaviour? How will it ensure that there are clear expectations for staff in applying the behaviour policy? - Is the behaviour policy right? How does it need to be changed? How will you ensure the behaviour policy is clear and understood and that it helps drive the culture of the school? - How will you ensure the policy is fair and applied consistently inside and outside school? - How will you ensure the policy has buy in from all staff, pupils, and parents? - Do you need to provide specific support for vulnerable pupils? - How do you ensure there are adequate attendance management processes in place? |
| 11) TEACHING STANDARDS | <ul style="list-style-type: none"> - How will you plan to drive up teaching standards? - How will you invest in high quality training and development? - How will you ensure the whole team knows what outstanding looks like? - How will you promote a culture of giving and receiving constructive feedback? - How will you promote the use of evidence and research? - How will you recruit? What will you build into recruitment processes to ensure you are successful? - How will you promote rigorous quality assurance? |
| 12) DATA/TRACKING | <ul style="list-style-type: none"> - What data systems do you have in place and what needs to change? - How will you use data as SLT? How will it inform practice? - Do you have the data you need to understand and challenge how well the school/trust is operating? - Do you have too much? - Do you have enough expertise on data collection and its analysis? |

Diagram 3

LEVELS OF ENGAGEMENT

The diagram below represents a sliding scale from Level 3 to 1 and is linked to Ofsted judgements. Level 3 is all about modelling and instructional coaching, Level 2 is a coaching situation and Level 1 is negotiable independence.

Level 1 – Partnership (Outstanding) – To Empower

- Identification of a list of achievable actions with targeted support.
- Full engagement in all networks e.g., Headteacher, Academy/School contributing and leading.
- Contribution to school improvement across the Trust as a means of CPD, retention and growth for valued leaders.
- Support for Governance if required.
- Back office and wide support as per partnership negotiation.
- Access to a pool of NQT's from LLT AMP SCITT.
- Wider contribution to the development of all schools in the Trust.
- Revised scheme of delegation.

Level 2 – Guidance (Working towards outstanding) – To Enable

- Director of School Improvement on site 1 day per week.
- Leadership coach for Headteacher and SLT.
- 3 module reviews from the Academy Improvement Partner.
- Provide support to Governors, a Chair of Governors and at least one Board appointed Governor.
- Access to all networks e.g., curriculum, T&L and Headteacher networks.
- Develop Trust wide approaches to Teaching, learning and Assessment.
- Full Implementation of Trust self-evaluation model.
- Back-office support according to need.
- Graded facilities and operations support according to need.
- Negotiated contribution to the development of all schools in the Trust.

Level 3 – Intervention (Working towards good) – To Engage

- Interim leaders provided as required.
- Director of School Improvement on site for 2 days per week.
- Leadership coaching at all levels.
- Conduct 6 module reviews working with the Academy Improvement Partner and Director of School Improvement.
- Establish robust tracking systems.
- Identification of a list of achievable actions.
- Provide support to Governors, a Chair of Governors and at least two Trust appointed Governors.
- Provide access to relevant targeted CPD and leadership programmes.
- Provide back-office support.
- Provide access to a HR Manager and recruitment team and legal support.
- Provide facilities, operations, and site support.
- Provide SLE support to curriculum areas.
- Provide access to NQT's (if applicable through Lydiate Learning Trust AMP SCITT).
- Provide access to networks e.g., subject, Headteacher.
- Develop Trust wide approaches to Teaching and leadership.
- Full implementation of Trust Self-Evaluation model.
- All subjects undergo the subject based review under the guidance of the Director of School Improvement (see diagram 4)

NON-NEGOTIABLES

Whilst the term “non-negotiable” does not sit comfortably with the vision and values of Lydiate Learning Trust (LLT) – it is simply not how we work – we have come to be aware on our journey that there are certain things that do work better in schools and Trusts. We, therefore, ask all our schools to work within the following framework:

RAISING STANDARDS AND SCHOOL IMPROVEMENT

Our core purpose is to improve student outcomes, and this is central to all that we do. We have the highest expectations of student performance, and we create a success culture in all our schools. We ask everyone to share the same core purpose.

VISION & VALUES

Lydiate Learning Trust has a clear compelling vision, set of values, and aims for the future. All stakeholders must be able to articulate what LLT stands for – its moral purpose, values, and objectives. There is a shared understanding of what it means to be part of LLT.

THE ROLE OF THE CENTRE

LLT will retain a clearly defined role for the Executive and central services team to improve the quality of Teaching & Learning and our supporting operations. Our centre makes the best use of existing expertise in our schools, and we expect all schools to contribute with the sharing and leading of best practice. Each school is expected to adopt the Trust CPDL minimum offer to support the development of Teaching and Learning and to adopt the LLT commitment to reading.

QUALITY ASSURANCE AND DATA

LLT will continue to use a wide range of qualitative and quantitative data that enables us to examine the performance of each school and the Trust as a whole. We will then use this data to inform the way forward. We will manage risk effectively and intervene swiftly providing support where it is required. In addition, we ask schools to adopt some tried and tested Trust practice including the internal faculty/department reviews and deep dives, to work with our Ofsted trained Academy Improvement Partners (AIPs) and to adopt the LLT assessment, recording and reporting process.

FINANCIAL STRATEGY AND CONTROL

LLT has clear systems for ensuring financial probity. We follow the financial regulations set out in the Trust Handbook, we budget effectively and have access to accurate management information. We use economies of scale effectively to benefit our schools and we are successful in pursuing new revenue streams as and when they are available. The LLT scheme of delegation is adopted by all our schools and negotiable based on earned autonomy.

GOVERNANCE

Following the Trust scheme of delegation each level of Governance is clear about their responsibilities (Members, Trustees, AGCs). Governors at all levels have access to a highly qualified Governance Professional and high-quality training, we ask that all schools adopt our governance model supporting the vision and values of LLT.

HUMAN RESOURCES, RECRUITMENT, RETENTION, AND STAFF DEVELOPMENT

LLT has a clear workforce strategy that seeks to recruit, retain, and develop staff at all levels. This applies to teachers and wider associate staff. We provide both internal and external professional

development and training starting with our SCITT and using the expertise housed in our LLT Academy for Education. We value our staff and support their careers with succession plans in place and we identify and nurture talent. To do these successfully all our schools adopt the LLT centralised HR resources, processes, and associated systems. They all comply with GDPR requirements.

OPERATIONS & ESTATES

The LLT central team work closely with the school site team(s) to ensure all our schools are 'fit for purpose', safe, well equipped, and welcoming. All our schools adopt the LLT systems of compliance. The Trust supports schools to access funds where they are eligible for capital improvement.

LEADERSHIP

LLT is committed to outstanding leadership. Leadership will have impact, be visible, empathise and will set the direction, and time, ensuring everyone is embracing the LLT vision and values. All our leaders will undergo an induction process and be expected to fully engage with the relevant leadership development opportunities.

TEACHING AND LEARNING 2021/2022: OUTSTANDING CPD FOR ALL

Vision: Ensuring Outstanding Professional Development for ALL

The vision for all Teaching and Learning Programmes is to create a model that fosters continuing professional development for all: the concept of stakeholders studying their craft by **continually seeking to improve, learn and develop** in order that we **engage, enable, and empower** teachers, leaders, and students.

Principles and Content of LLT Teaching and Learning Programmes

There are 5 Strands to the Teaching and Learning Programmes all of which link with the Trust vision and values: **engage, enable, empower**. To effectively embed the concept of Outstanding CPD for ALL, all strands of the programme involve the creation of a consistent and coherent pedagogical approach to CPD, translating research into the classroom, embedding best practice, and fostering true collaboration.

Strand 1, centres around the Olevi coaching and facilitation model which incorporates *The Outstanding Teacher Programme, The Creative Teacher Programme and The Power of Coaching*. Olevi also provides comprehensive training for Teaching Assistants - *Outstanding Teaching Assistants: Train the Trainers*.

Strand 2 incorporates a Learning Trio model using Doug Lemov's *Teach Like a Champion* for effective classroom-based strategies which complement the work undertaken by the Olevi members: each Trio contains a graduate coach from the *Outstanding Teacher Programme* and *Power of Coaching* Course to ensure quality facilitation within each Learning Trio.

To underpin the concept of stakeholders studying their craft, **Strand 3** focuses on research-based enquiry, so that staff are empowered to engage in the most relevant research pertinent to their individual and/or faculty identified needs or areas of interest.

All members of a Faculty Team will be involved with effective CPD that encourages all to continuously seek to improve and consciously craft their practice which will lead to personal, faculty and whole school improvement. With this in mind, **Strand 4** focuses on sharing best practice with innovation (using Office 365 to publish research and reflect on practice), whilst capitalising on collaborative cross-trust opportunities so that a common language for learning is utilised and acknowledged across the Trust which benefits all stakeholders.

Strand 5 – will offer staff a range of opportunities to further develop professional improvement – NPQML, NPQSL and NPQH. This will allow the Trust to further develop the leadership at all levels of the Trust.

Lydiate Learning Trust Academy for Education (Vortex House Training Centre)

The Lydiate Learning Trust Training Centre is the professional development centre for the Trust and for Associated Merseyside Partnership SCITT. It is based at Vortex House, Wavertree, and builds on the Trust T&L framework. It provides high quality training that is well established and facilitated by experienced school leaders from within, and beyond, the Trust. At present the training centre offers NQT training, improving teacher programmes, all national leadership programmes, research and development projects, subject training, as well as hosting the Trust INSET day annually that focuses on the main areas for school improvement across the Trust.

Self-Evaluation

The Lydiate Learning Trust has a robust self-evaluation programme that integrates with the Academy self-evaluation. Our Executive Leaders conduct similar exercises, often jointly, to the Academy senior teams so that everyone is confident in their judgement.

The self-evaluation plan can be seen on [page18](#).

Academy Improvement Partners

A funded Academy Improvement Partner is allocated to the Academy to provide challenge and support where required. The Improvement Partners are often fully trained OFSTED Inspectors and have a wealth of school senior leadership experience. Working with the Improvement Partner can often be seen as the very best kind of CPD for Leadership development. The Improvement Partner works to the Executive Team and is responsible for monitoring the support offered to Academies as well as the performance of the Academy.

Lydiate Learning Trust: Self Evaluation Plan 2021/25

| | Quality of Education | Behaviour & Attitudes | Personal Development | Leadership and Management | Finance, Operations and Resources |
|-----------|--|---|---|---|--|
| September | <ul style="list-style-type: none"> External exam analysis for all Trust schools and Exam summary produced. Review of exam summary by Executive team to determine key areas/subjects of success and areas for improvement. Directors of School Improvement to work with HTs to draw up rapid improvement plans. SES on quality of education revised by HTs and agreed. SLEs commissioned as appropriate. Annual CPDL programme agreed and approved. | <ul style="list-style-type: none"> Review of suite of behaviour policies i.e., behaviour, anti-bullying, attendance etc. | <ul style="list-style-type: none"> Review RSE policies and how RSE is delivered across the school. | <ul style="list-style-type: none"> Review Trust vision in each school. Ofsted training begins for school expecting Ofsted this academic year. Review the SIPs in light of the exam performance. And approve at board level. AIP visit to school/themed visits. Review of Trust and individual school self-evaluation policy and procedure. Website compliance review. Developing open-evening and marketing plans. | <ul style="list-style-type: none"> Review any pupil number adjustment issued by EFA for effect on funding. Review new Academy Financial Handbook and amend any internal policy. Review 16-19 bursary policy and application process Issue internal department budgets. Review single central record. Annual development plan due for support services and business operations. Quality assure SIMS student data Support staff appraisal cycle to commence. |
| October | <ul style="list-style-type: none"> Department inspections/reviews and deep dives are conducted in areas of concern and areas to celebrate and learn from. Directors of School Improvement to conduct T&L walks across all schools. Director's review AP1 for y11/13. | <ul style="list-style-type: none"> Director observes the meeting between Link Governor and Behaviour & Attitudes SLT lead. | <ul style="list-style-type: none"> Full analysis of destination data. Directors review the development of SMSC and "cultural capital" across all schools. | <ul style="list-style-type: none"> Review appraisal documents. Senior DSL to review of safeguarding policies and procedures (Inc. SCR) across all schools. Review of alternative provision use, policy, and procedure across all schools. L&M SES reviewed across all schools. Review all statutory and key policies across all schools. HT appraisal conducted by CEO | <ul style="list-style-type: none"> School Census due - Autumn 16-19 bursary data collection exercise by EFA. Condition Improvement Fund guidance issued-plan for academic year. Year End Audit of accounts. Issue salary statements to teachers. |

| | Quality of Education | Behaviour & Attitudes | Personal Development | Leadership and Management | Finance, Operations and Resources |
|----------|---|---|---|---|---|
| November | <ul style="list-style-type: none"> Directors of School Improvement to lead co-observations with SLT in schools to ensure consistent standards. | <ul style="list-style-type: none"> Executive Head teacher and Directors of School Improvement Leads to facilitate an observation of behaviour exchange review between HTs. Review the behaviour and attitudes SES. Review attendance across all schools. | <ul style="list-style-type: none"> Analyse how British Values are promoted across the school. Analyse extra-curricular offer and take-up patterns | <ul style="list-style-type: none"> AIP visit to school on themed visit. Review projected pupil numbers. Directors to look at moderation plans across schools. Directors to review the performance of groups – disadvantaged, SEN, High, Middle, Low. Sample staff appraisal reviews and targets. | <ul style="list-style-type: none"> School workforce census due. EFA request estimated pupil numbers. Condition Improvement Fund application window opens. Review support service-HR. |
| December | <ul style="list-style-type: none"> Directors of School Improvement will randomly select a department to review the curriculum (deep dive). Director's review AP2 y11/13. Director's review Ap1 y10/12. | <ul style="list-style-type: none"> Review attendance data. Review exclusion data (both FTE and permanent). Review bullying log. | <ul style="list-style-type: none"> Review the personal development SES. | <ul style="list-style-type: none"> Directors to analyse the CPDL offer to staff across each school e.g., curriculum, subject knowledge etc. | <ul style="list-style-type: none"> Audit financial statements to be submitted to ESFA and Companies House. Condition Improvement Fund application window close. Review support service-IT. Publish Executive pay on website. |
| January | <ul style="list-style-type: none"> Directors conduct a full analysis of the disadvantaged review, plan, and progress for each school. | <ul style="list-style-type: none"> Directors of School Improvement will interview randomly selected students about learning, behaviour, etc. A formal student voice, questionnaire is issued across all schools. | <ul style="list-style-type: none"> Review of equal opportunities policy across schools and how it is applied. | <ul style="list-style-type: none"> AIP visit to school on themed visit. Directors to review parent engagement policy and programmes across all schools (focus on supporting pupil's education). Parent questionnaires issued. Directors review option figures y10, y12. | <ul style="list-style-type: none"> School Census due - Spring. Academies accounts direction guidance issued. Financial Accounts and Report published. Review support service – Administration. Responsible officer work due. |
| February | <ul style="list-style-type: none"> Directors review how reading is promoted across all schools and the report shares best practice as well as areas to develop. | | <ul style="list-style-type: none"> Review of SEN provision. | <ul style="list-style-type: none"> Review line management procedures. Review SIPs and long-term strategic planning to ensure progress. | <ul style="list-style-type: none"> Admissions timetable due to be published. Budgeting and funding allocation guidance due from EFA. Review support service-ICT. Support Staff appraisal-1st review. |

| | Quality of Education | Behaviour & Attitudes | Personal Development | Leadership and Management | Finance, Operations and Resources |
|-------|--|---|--|---|--|
| March | <ul style="list-style-type: none"> Directors facilitate a cross exchange learning walk between schools. Director's review AP3 y11/13. Director's review AP2 y7-10/12. | | <ul style="list-style-type: none"> Directors analyse how character building is addressed across schools and how resilience is developed, best practice celebrated and shared. | <ul style="list-style-type: none"> Directors to review how HTs take into account the well-being and workload of staff. Reports will include the best practice. | <ul style="list-style-type: none"> Final funding allocation due from EFA due. Post 16 funding rates issued. Review support service -Educational support. Internal budgeting process starts. |
| April | <ul style="list-style-type: none"> Directors review schemes of learning in a random selection of subjects and discuss with subject leaders. | <ul style="list-style-type: none"> Review SCR. | <ul style="list-style-type: none"> To review the CIAG provision across all schools. | <ul style="list-style-type: none"> Directors to conduct a formal evaluation of any external support used across each school. AIP visit to school on themed visit. | <ul style="list-style-type: none"> Submit admission arrangements to LA. Condition Improvement Fund grant awards announce. Review support service -Finance |
| May | | Senior | | | <ul style="list-style-type: none"> School Census due - Summer. Academies accounts direction document issued. Support staff appraisal-2nd review. Start planning for summer shutdown works. Submit forecast return to ESFA. |
| June | <ul style="list-style-type: none"> Director's review AP3 y7-10/12. | | | <ul style="list-style-type: none"> Directors review AIP and SIPs. Directors review self-evaluation plans. | <ul style="list-style-type: none"> School capacity survey due. Internal budgeting process ends. |
| July | <ul style="list-style-type: none"> Review of implementation and impact of CPDL. | | | <ul style="list-style-type: none"> Issue reporting programme for summer results. | <ul style="list-style-type: none"> Pupil Premium allocation Submit budget to ESFA. Issue completed summer works plan. Issue Trust contribution fund statements to schools. |

Business Directorate – to address Academy needs

Operations, Facilities & Site Services

- Statutory maintenance compliance.
- Statutory H&S compliance – Policies, risk assessments and documentation to ensure compliance with HSE requirements.
- Site condition surveys
- Health and Safety training. Training in mandatory subjects such as Asbestos, legionella, working at height (general requirement for those staff who carry out regular work i.e.: caretakers, site staff, catering staff) and Fire Safety.
- Client side management of capital schemes and refurbishment work.
- Health and Safety advice available via telephone or site visits.
- Site maintenance advice via telephone or site visits.

Finance Services

Main Offer

- Financial Management
- Provision of accounting software.
- Provision of Budget planning and monitoring software.
- Preparation of monitoring reports on Budget v Actual expenditure, including detailed salary monitoring.
- Annual budget setting and development of 3-5 year financial plan, including deficit recovery if required, with linkage to the School Development/Improvement Plan.
- Submission of all statutory returns to Central Government.
- Completion of VAT claims and returns to HMRC.
- Year-end accounts preparation and liaison with external auditors.
- Standardised set of accounting policies and School finance policy documentation.
- Attendance at governor and finance committee meetings, as requested.

Other items

- Support and guidance relating to bank, payroll, and control account reconciliations.
- Flexible telephone and email support service.
- Accounting support including accruals/prepayments and year end reserve provisions.
- Set up and maintenance of fixed asset register including depreciation.
- Arrange insurance inc. RPA, Travel and Minibus.
- Reports to enable the close monitoring of academy activities (e.g., After School clubs, in-house catering etc.).
- New academy banking arrangements set up.

Human Resource Strategy 2021/25

Our people play a key role in ensuring the future success of our children and our Trust. Throughout 2020/21, the Trust will continue to work to create an environment that supports our people and our vision; and enables us to continue to grow and develop.

Key Objectives

Ensuring robust recruitment and succession policies are in place to ensure a continual flow of resource and talent.

Creating a high-performance culture where expectations and standards are clear, and performance is reviewed regularly and developed accordingly.

Providing individuals with the opportunity to develop their skills and improve their performance through personal development.

Alignment of all people related policies and procedures, ensuring fair and consistent approach across all areas within the Trust.

Utilising the Trust wide HR Information System to enhance reporting; and provide automation of all people related processes, thus creating a more productive working environment.

Promote Health and Wellbeing across the Trust, delivering central and local initiatives; to support wellbeing of our people.

Human Resources Services

- Professional HR advice and guidance in line with employment legislation including advice on the interpretation and application of pay and conditions of service for teachers and support staff.
- Advice and support on employee relations and industrial relations issues including trade union involvement and consultation.
- Supporting Headteachers to develop talent mapping and succession plans in line with Trust processes.
- Employer Assistance Programme
- Health and well-being programme
- Advice on managing the employment process from beginning to end including consultation requirements, notification and involvement of staff and unions, redeployment, early retirement and redundancy arrangements and estimates.
- Supporting change processes which may include preparing for and implementing proposals for new staffing structures.
- Advice and guidance on the recruitment, selection, and appointment of teaching and non-teaching staff.
- Providing advice and support in managing short term and long-term sickness absence, including outcomes from Occupational Health referrals.
- Supporting referrals to the Occupational Health Service to facilitate the resolution of health and absence issues impacting on schools.
- Bespoke HR-related training as required.
- Support in delivering exit strategies.

Payroll Services

We offer:

- A dedicated Payroll Lead (via phone and email).
- Calculation of contributions for HMRC.
- All statutory PAYE, NI, Pensions, Court Order Payments.
- Bespoke Management Reports.
- Audit of historical payroll data.
- Production and submission of P60's.
- Submission of HMRC RIT and EPS.
- Monthly data collection – Teachers' Pension Scheme, Local Government Pension School uploads.
- Provision of payslips for individuals.

The purpose of the financial strategy is to support the strategic aims of the Trust by providing long-term financial sustainability.

This means ensuring that sufficient resources are available for Teaching & Learning priorities, growth plans and contingencies, whilst maintaining strict compliance with statutory obligations and upholding best practice. The key financial objectives to achieve this strategy are set out below.

To generate and maintain sufficient cash to support the Trust's strategic objectives

Over the period of this strategy the Trust plans to financial results which generate cash to build up reserves whilst adequately funding normal operations. Building reserves is necessary to provide some resilience in the challenging and uncertain financial environment, by setting aside funds for capital investment, to provide contingency to allow for unforeseen fluctuations in financial performance, and to accommodate risks. The generation of cash from operations requires the Trust to grow its income whilst also managing its costs – these are covered in separate points below.

To grow and diversify income

The Trust continues to seek opportunities to grow income. Whilst the Schools are at capacity in Key Stages 3 and 4, there is potential for a modest increase in student numbers in the Sixth Form and the SCITT. The expansion of the Trust to include another School or Schools would grow income and further improve the economies of scale. In addition, the Trust continues to explore self-generated income and other grant funding sources – including for capital expenditure – where these activities fit with the core purpose of the Trust. Such activities will be scrutinised carefully to ensure sustainable financial benefit is delivered and all associated risks are identified and considered.

To operate efficiently and effectively by managing the cost of operations and delivering value for money

It is essential that the Trust strictly prioritises its expenditure by taking account of its strategic aims. To this end, the budget-setting and monitoring process will be increasingly aligned to the strategic plan and the Integrated Curriculum Financial Planning (ICFP) process. The efficiency of both teaching and non-teaching staff structures are monitored to ensure that the Trust is best placed to meet the financial impacts of external pressures such as pay awards and pension cost increases. The Trust will continue to pursue economy, efficiency, and effectiveness through the centralised procurement of goods and services and periodic review of contracted and outsourced services.

To manage capital investment projects to deliver future financial benefit to the Trust

The Trust will assess all proposed capital investment projects against its strategic plan, with a view to prioritising projects and only progressing those which deliver its key strategic aims. In determining the impact of capital investment, the long-term financial implications for the Trust would be reviewed as part of the decision on affordability. All proposals will be supported by fully costed business plans which consider the whole-life costs and performance of assets. Proposals can

include 'spend to save' capital investment in areas such as maintenance, which can create high financial rates of return with greater performance and reduced annual operating costs.

To effectively manage financial risks

The Trust has processes in place for the identification, assessment and management of financial risks which could threaten the achievement of strategic aims. These processes are built into the annual cycle of financial planning for budgets and 3-year forecasts, which include sensitivity analysis to highlight variances that could result from changes to the underlying assumptions and unforeseen threats. Re-forecasts are carried out within the financial year to illustrate known and potential deviations from budget, thus enabling corrective action to be taken as needed.

To operate sound treasury management

Since holding adequate cash balances is critical to survival, cash, and other liquid assets – such as debtors and creditors – need to be carefully managed for operational purposes to ensure that the Trust has sufficient liquidity to meet its liabilities as they fall due. Cash flow forecasts are maintained to ensure that projected cash balances are sufficient to meet the short, medium, and long-term needs of the Trust, with mitigating actions to be taken as necessary to ensure that cash balances remain positive.

To effectively report and communicate the Trust's financial performance both internally and externally

To effectively monitor and manage the Trust's financial performance it is essential that the financial impact of all its activities are effectively and transparently communicated. Monthly management accounts are prepared, which comprise the income and expenditure account, variation to budget report, cash flows and balance sheet, together with accompanying narrative. The Trust adheres to the annual statutory reporting requirements and receives external, independent assurance on the accuracy of internal and published accounts.

To maintain robust systems of internal control

To support the achievement of the financial strategy, the necessary systems, procedures, policies, and controls will be maintained and improved within the Trust. These include: - accurate and transparent processing of financial transactions in appropriate finance systems; regular in-year monitoring undertaken in discussion with budget holders; compliance with statutory and regulatory requirements; mechanisms for budgetary control; and scrutiny by internal and external independent auditors. A Scheme of Delegation is in place to ensure that financial transactions are authorised at the appropriate level.

Capital Strategy 2021/2025

To deliver the LLT vision across all centres the Trust must be able to provide flexible facilities to accommodate the learning needs of all our students. A Trust wide approach with the right resource, plans, policies, and documents in place to make sure the estate supports the Trust's education needs and goals now and in the future.

Key Objectives

1. To meet current legislation, including Health & Safety requirements and ensuring compliance/mitigating risk etc.
2. To optimise the use of teaching & learning facilities.
3. To ensure access to bidding streams e.g., CIF to support any required refurbishment and new build.
4. To ensure a planned maintenance programme is agreed annually and delivered in all centres.
5. To consider environmental sustainability.

Achieved by:

- Adopting an approach to support the Trust's education needs and goals by involving the whole organisation and integrating with the business planning processes
- Taking a long-term view of investment, revenue and expenditure across the whole estate whilst allowing for local autonomy in the way the strategy is delivered
- Always understanding educational and organisational priorities and needs may change over time. Maintaining and developing the estate to meet those needs now and in the future
- Conducting a Trust wide strategic estates review every five years
- Developing a best-in-class due diligence model for schools joining the Trust

Methodology:

- Meeting educational goals
- Ensuring the estate can support the Trust educational goals and vision so, competently managing any shortfalls or surplus provision in our schools
- Assessment of condition and what spend, or resource is needed to make it safe
- Assessment of any changes or works required and how these need to be prioritised

Governance arrangements:

We will have good governance arrangements in place to make sure that:

- The estate is managed as a strategic resource
- There is Board and executive leader responsibility for the estate
- All estate related roles and responsibilities are defined and understood

Assigning responsibilities:

We will be clear about who is involved in the strategic planning process in the Trust. This will include:

- Board of Trustees
- CEO

- Executive Team
- Local Academy Governing Board
- Head of School
- Local authority & other 3rd party partners

Implementation:

A clear and timely coordination of all estate related activities. Part of the asset management plan based on an analysis of need and data to ensure:

- All works and projects are prioritised to meet safety and educational goals and minimise risk profile
- Funding sources, budget availability and constraints are recognised
- Opportunities for capital and revenue savings are maximised
- Minimise disruption to Academy operations

Review and track performance:

A rigorous process whereby the estate is effectively managed to ensure that:

- Executive leaders understand the importance of measuring the performance of the estate; knowing what the estate costs to run, what condition it is in and how much needs to be spent to meet safety and educational goals
- Poor performance is identified; managing expenditure, effective and efficient use of space or that there is a safety risk to users
- Business cases for change or expenditure are considered by the right parties in the Trust
- Economy of scale and value for money are achieved; for example, utilities provision or procuring capital works
- The estate risk profile is minimised by effective management of all H&S issues
- Benchmark performance: are running costs higher than others and, if so, understand the reasons and how to make improvements

Systems and processes required:

- Estate Vision: this should be a high-level statement aligned to the Trust Educational Vision. It will take account of our educational and safety needs and provide the direction for the estate
- Estate Strategy: a 3 to 5 year medium to long-term strategy to help understand what the Trust needs from the estate, set out potential options to achieve those needs and identify issues that will need further consideration to provide a framework for property-related decision-making
- Asset Management Plan: a short to medium-term plan that details and prioritizes what actions the Trust should take to fulfil the estate strategy
- Estate Development Plan: a plan to coordinate the works identified in the asset management plan into a single programme with a structured plan of work to show how the whole estate will be developed over a set period
- Risk Register: a system whereby all risk is identified, scored, and rectified in the timeliest fashion possible
- Due diligence model: a rigorous and comprehensive plan for integrating new schools to the Trust in a timely fashion
- Strategic Review Process: to understand the existing estate, identify options for its future, assess how well the estate is performing and if it meets the Trust's needs

Future expansion

A full detailed due diligence is undertaken for any future schools joining LLT and plan the integration and migration of services in the first 18 months.

Market Analysis

Current Position

There are currently 2,366 students studying in Lydiate Learning Trust schools.

| | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|------------------|----------------|----------------|----------------|----------------|----------------|
| Childwall | 840 | 842 | 968 | 1,081 | 1,001 |
| Deyes | 1,403 | 1,403 | 1,394 | 1,493 | 1,365 |
| Total | 2,381 | 2,396 | 2,402 | 2,574 | 2,366 |

Deyes High School

Total number of students is 1,365. Deyes has a PAN of 230 in Year 7 but has recruited 10-12 students over PAN in the last 4 years on appeal. In 2021 Deyes took 240 students in Year 7. Deyes is a very popular school, and this has led to a large number of disappointed students and families having to go to other local schools. There is a waiting list in Years 8-11.

In addition, Deyes High Governors took a conscious decision to reduce the numbers in College@Deyes (Post 16 provision) to ensure quality delivery. This strategy is now showing impact, the College stands at 205 (98 Y12/107 Y13) students and a good Ofsted rating was secured. It is now time to increase the numbers recruited incorporating a wider catchment area in light of the new school build.

Childwall Sports and Science Academy

Total number of students is 1,001 Childwall has a PAN of 180. In 2018 they recruited 179 with a waiting list. In 2019 Childwall recruited 10 students over PAN (in negotiation with LA). Total 190. In 2020 Childwall held appeals for the first time. In 2021 Childwall comfortably secured 192 intake and now has appeals and a waiting list. Currently there are 107 Sixth Formers (69 Y12/ 38 Y13), and the Sixth Form is growing in line with increased year numbers lower down.

AMP SCITT

AMP recruited 74 trainees across the secondary and primary sectors in September 2020. This increased to 83 SCITT trainees in 2021 and 18 Primary trainees at Ashton (the new sub-satellite centre).

Marketing Strategies

Lydiate Learning Trust will focus on the following marketing strategies.

- Gap Analysis- A more rigorous analysis of what the community needs e.g., support for primaries, support for requires improvement schools, working closely with other MATS on an informal basis.

- Online- LLT will further develop a social media presence via Twitter to establish a dialogue with the community.
- Other
 - Liaison with the RSC office (see previous)
 - Review LLT approach with interested schools.
 - Liaise with other MATs.
 - Marketing of AMP SCITT
 - Marketing of LLT Training offer

Summary Marketing Plan

NB Each School, AMP SCITT and LLT Training have an individual marketing plan appropriate to their setting. The summary is as follows:

Exterior Media

The exterior media could include key campaigns which would centre around taster days and open evenings to raise awareness and footfall where required.

Events

Field Events

Where appropriate, key events e.g., careers fairs, business fairs, and area-wide events will serve to increase awareness.

Attractional Events

Large scale events will be hosted throughout the year. Again, these will be relevant to the individual site e.g., productions, open events, sports events etc.

Promotional Materials

Each centre will have a constant supply of high-quality promotional materials approved by the Executive Team.

Collective Branding

In 2018/19 LLT re-branded. All schools have worked together to develop a brand that identifies our family of schools. This went live in 2019/20. Our websites will be launched in 2020/21.

Growth and Expansion

Potential

- Lydiate Learning Trust has expanded quite quickly but has also built an infrastructure that allows for such. The Trust has a strong governance structure, experienced CEO and Executive Team. Through working with local teaching schools', LLT have also appointed a team of specialist leaders in education and through pooling resources and economies of scale appointed a Finance Director, a HR Executive, a Director of Operations, and several Trust wide learning support staff (see staffing structure).
- We work closely with local Teaching Hubs and Alliances so we can enlist wider support.
- Geographically we are centrally located with ease of access to Liverpool, Sefton, Knowsley, St Helens, Wirral, and Lancashire and close to the motorway interchange.
- AMP, LLT's SCITT has expanded and is very well regarded across the North West. It is set to expand further. Approximately 32 schools have representatives on the management team, and we are regularly approached by both Primary and Secondary schools to join. AMP SCITT opened a sub-satellite centre in Ashton, Manchester in 2021.
- AMP SCITT is housed in an Education training centre known as Vortex House, Liverpool.

Barriers to Growth

- In the Primary sector the local area in which the Trust is based is still largely averse to the concept of Multi-Academy Trusts.
- The emergence of other Trusts locally in the Secondary sector beginning to change the local dynamic.
- Reduced numbers of formal introductions.
- The Merseyside/Cheshire area has several schools commissioning only through NLE's outstanding schools.
- The introduction of new MATs to Liverpool from outside the area.

Strategies to overcome the barriers

- a) The improved school performance, increased intake and financial stability should attract others.
- b) Work closely with the Office of the RSC to request introductions and to enlist their support to facilitate brokerage.
- c) To review presentations to interested schools.
- d) To review the marketing strategy.
- e) To continue to work in the numerous partnership networks already established e.g., MAT Si Group, Rainbow Teaching Hub
- f) Establish an approach based on partnership ("Try before you buy").
- g) Establish and further embed, the work of the training centre and SCITT to work more collaboratively on school improvement.
- h) Further promote the principle of collaboration and sharing of best practice with other MATs and SATs in the area.

- i) To support the Primary sector with school improvement by capitalising on our primary connections and developing the role of the newly appointed Primary Executive.

NB: The DfE document entitled “Building Stronger Academy Trusts” May 2021 should help to facilitate MAT development and further partnerships.

Expansion

AMP SCITT

AMP SCITT has grown annually since introduction in Jan 2015. It now has on average 80+ trainees per year and has grown to incorporate the Primary sector and we now offer early years training. We are locally the provider of choice, and we buck the national trend for recruitment. AMP SCITT continues to grow year on year. Most recently, we have entered a partnership with Ashton College, Manchester to develop a Primary training centre.

Lydiate Learning Trust

There is clear appetite for and commitment to expansion of the Trust. Directors feels that the closure of Studio@Deyes was managed well, and they do not envisage any issues, there is therefore, the capacity to expand. However, Lydiate Learning Trust will always follow a measured growth strategy.

- LLT Directors feel strongly that they have a lot to offer schools and welcome the ideas new parties bring.
- A scoping exercise acknowledged that expansion in the secondary sector local to our 2 schools is unlikely. However, the Trustees are keen to expand to benefit a wider group of students. Careful consideration has led to a realignment to include:
 - i. A wider perimeter of influence. The “Lydiate Way” will provide a set of parameters for any school to work within regardless of geographical location. This has been put to the test during the pandemic and proven to work. We now have the infrastructure required to make this work.
 - ii. The Directors and Executive team recognise the wealth of expertise our Primary partners bring to the secondary sector and vice-versa. A Primary school would be a welcome addition to the Trust.
 - iii. The risk factors associated by growth are fully recognised by the Board of Trustees and as such are noted in the corporate risk register.
 - iv. It is our intention to expand AMP SCITT to include a minimum of 100 trainees with effect from Sept 2022 and expand further in subsequent years. The SCITT will also begin to develop as an “Institute” of learning for Teachers and other school-based professionals. A new base a Vortex House, Liverpool, has been secured and will allow for a centre dedicated to teacher training.
 - v. LLT will develop the newly formed Teacher Academy for Education by coordinating and delivering CPD for all levels from Vortex House and in working in partnership with many other agencies.

Part 2

Current Performance

OFSTED Analysis 2020/21

| <u>School</u> | <u>Outcomes</u> | <u>Teaching & Learning</u> | <u>Personal Development, Behaviour & Welfare</u> | <u>Leadership & Management</u> | <u>Sixth Form</u> | <u>Overall</u> |
|--|----------------------|--------------------------------|--|------------------------------------|----------------------|----------------------|
| 2019 Deyes High School | Requires Improvement | Good | Good | Good | Good | Good |
| 2016 Childwall Sports and Science Academy | Requires Improvement | Requires Improvement | Good | Good | Requires Improvement | Requires Improvement |
| AMP SCITT | OFSTED - Good | | | | | |

Part 3

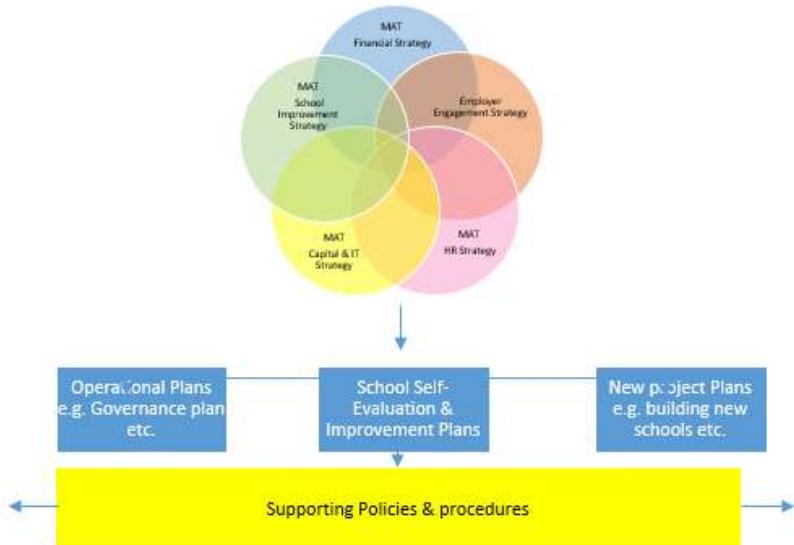
Strategic Objectives 2021-2025

The Lydiate Learning Trust Board have agreed:

- 1) The Trust manages and recovers from COVID.
- 2) To develop a clear strategic vision.
- 3) To increase the quality of provision within all LLT schools and improve academic standards and achievement.
- 4) To further develop a strategic recruitment, retention, and succession strategy to develop and retain our workforce.
- 5) To ensure a financially viable and sustainable MAT.
- 6) To further develop quality governance across the Trust to provide the support and challenge required to ensure progress.
- 7) To provide a learning environment of the very highest quality.
- 8) To develop new partnerships to aid our development as a MAT and that of LLT schools.

Lydiate Learning Trust has a range of strategies which link to the strategic plan. This is illustrated below.

Lydiate Learning Trust 2019-22 Strategic Plan



We use the MAT Assurance Framework (Robert Hill) as the basis for self-reflection and review.

The MAT assurance framework:

| | | | | | |
|--|---|---|---|---|--|
| 1. Vision, culture and ethos A. Clarity of purpose B. Understanding of needs C. Leading a culture of improvement | 2. People and partners A. Building capacity for improvement B. Recruiting, developing and retaining talent | 3. Teaching and learning A. Approach to pedagogy B. Leadership of teaching C. Evidence based professional learning models | 4. Curriculum and assessment A. Curriculum principles, intent and alignment B. Intentional use of assessment | 5. Quality Assurance and Accountability A. Knowing schools quantitatively B. Knowing schools qualitatively | 6. Governance capability A. Governance structures and skills B. Capability to refresh and renew |
|--|---|---|---|---|--|

STRATEGIC OBJECTIVE 1: The Trust manages and recovers from COVID-19.

| Why is this important? | | | |
|---|---|---|---------------------------|
| During the academic year 2019-2021 all the Trust schools have been negatively impacted by the pandemic. We are no different to any other Trust or school. Much work was put into place to support students, staff, and the community during this challenging period and now that from September 21, schools are in full operation a clear recovery plan is essential. | | | |
| Indicators of success | | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) | |
| - All Academies and workplaces are safe to students, staff, and parents. | - All Academies and workplaces are safe to students, staff, and parents. | - All Academies and workplaces are safe to students, staff, and parents. | |
| - All Academies work proactively to minimise the impact of the pandemic on outcomes (academic, financial, well-being etc.) | - All Academies work proactively to minimise the impact of the pandemic on outcomes (academic, financial, well-being etc.) | - All Academies work proactively to minimise the impact of the pandemic on outcomes (academic, financial, well-being etc.) | |
| Recovery - Trust/schools to capitalise on lessons learnt from remote education. - Schools have clear systems and strategies in place to support students and staff in returning to the structured environment of schools. | - Trust/schools to capitalise on lessons learnt from remote education. - Schools have clear systems and strategies in place to support students and staff in returning to the structured environment of schools. | - Trust/schools to capitalise on lessons learnt from remote education. - Schools have clear systems and strategies in place to support students and staff in returning to the structured environment of schools. | |
| Which Strategies & plans will deliver this action? | | | |
| School Improvement Strategy | HR Strategy | Operational Strategy | Financial Strategy |
| - MAT School Improvement plan - Individual school recovery plans - Work of Standards Committee - Intervention plans | - Staffing - Well-being - Common language | - Risk Assessments - Increased hygiene | - Protected reserves |
| MAT Lead Officers - CEO (Lead Officer) - Director of School Improvement - Director of HR - Director of Finance - Director of Operations | | | |

STRATEGIC OBJECTIVE 2: To improve academic standards and achievement across the Trust.

| <p style="text-align: center;">Why is this important?</p> | | |
|--|--|--|
| <p style="text-align: center;">Indicators of success</p> | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| <ul style="list-style-type: none"> - To provide support to further develop Maths across the Trust. | <ul style="list-style-type: none"> - To embed the KS4 Maths Scheme of Work across the Trust. | <ul style="list-style-type: none"> - Embed KS3 and KS4 Schemes of Work. |
| <ul style="list-style-type: none"> - Ensure KS4 Maths Scheme of Work are fit for purpose and shared across the Trust. | <ul style="list-style-type: none"> - To ensure the KS3 Schemes of Work are fit for purpose and shared across the Trust. | |
| <ul style="list-style-type: none"> - Review and ensure the Trust Maths curriculum is fit for purpose in each centre. | <ul style="list-style-type: none"> - HT, SLT and MLT's can explain their curriculum in detail and demonstrate it produces the desired outcomes. | <ul style="list-style-type: none"> - The curriculum is embedded across all Trust schools and as before. |
| <ul style="list-style-type: none"> - To ensure there are strong leaders in each 'Core and EBacc teams across the Trust and they are trained to a high level to yield results. Each Leader will follow 'Leverage Leadership' training programme. | <ul style="list-style-type: none"> - Training programme for 'core leaders' is fully embedded and all core and EBacc leads work together across the Trust. - Leverage Leadership is embedded as a natural way of working and impact is evidenced. | <ul style="list-style-type: none"> - Heads to monitor and train other leaders and new 'core' leaders. |
| <ul style="list-style-type: none"> - To develop a Trust innovation project centred around ambition & achievement. | <ul style="list-style-type: none"> - Embed the project and demonstrate impact. | <ul style="list-style-type: none"> - Continue to develop. |
| <ul style="list-style-type: none"> - The gap between disadvantaged and non-disadvantaged student's starts to close in 2 centres. - Formal pupil premium review takes place by AIP and external reviewer. | <ul style="list-style-type: none"> - Action on the formal reviews is introduced. - The outcomes gap begins to close. | <ul style="list-style-type: none"> - Strategies for the disadvantaged are successful and gap closes. |

| - All academies/schools graded at least good for L&M by Ofsted. | - All academies graded good by Ofsted and working towards outstanding. | - All academies demonstrating outstanding features in anticipation of Ofsted grading. |
|--|---|---|
| - Review and ensure all post-16 centres are financially viable. | - Both post-16 learning centres have a clear marketing plan to maximise numbers. | |
| - Revise the trust attendance strategy to ensure the attendance in both large schools are above national. | - Improve the % attendance figure year on year. | - Embed the revised strategies. |
| - Review and revisit the strategy for persistent absence and introduce new, effective strategies through researching success | - Ensure the PA% is below national average and implement the revised strategies. | - Embed the revised PA strategies. |
| Which Strategies & plans will deliver this action? | | |
| School Improvement Strategy | HR Strategy | Financial Strategy |
| - MAT School Improvement. - Standards & Outcomes Committee work plans. - School Improvement plans. - Intervention plans. | - Recruitment & Retention strategy. - Succession planning strategy. - Appraisal policy. | - Protected resource for school improvement lines. |
| MAT Lead Officers | | |
| <ul style="list-style-type: none"> - CEO - Director of School Improvement (Lead Officer) - Director of HR - Director of Finance | | |

Objective 3: To further develop a strategic recruitment, retention, and succession strategy.

| Why is this important? |
|---|
| Attracting and retaining high quality teachers and associate staff in schools is a challenge in the area in which LLT operates. This is especially true in a time of increased accountability and limited resources. It is more challenging in some subject areas than others. However, it is a challenge we need to embrace. Likewise, at LLT our staff are very important to us, and we need to look after them protecting their workload and providing clear lines of progression etc. When questioned as part of a survey by Affinity Workforce 60% of school leaders and those responsible for recruitment in schools, reported that attracting high quality staff has become more challenging for their school in the last 2 years and 65% said their current recruitment efforts are failing to produce enough high-quality candidates (<i>J. Owen, Academy Today 2018</i>). |

| Indicators of success | | |
|--|--|---|
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| - To become an employer of choice through developing an effective teacher recruitment campaign and long-term recruitment plan. | - Embed the recruitment plan and develop the reputation as a first-choice employer. | - Sustain the recruitment strategy and reputation. |
| - Establish a long-term recruitment and succession plan that retains high quality staff. | - Clear lines of professional development and promotion are established. - All staff are tracked re CPD across all schools. - Shortages and issues remapped and projected forward. | - Long term recruitment and succession plan embedded. |
| - Establish stakeholder satisfaction surveys and identify patterns and areas for development. | - Feedback is carefully analysed and addressed to ensure happy, inspired, motivated and successful workforce. | |
| - A leadership strategy is developed at all levels. | - Leadership is fully developed at all levels across the Trust. | |
| - To develop a comprehensive well-being programme for staff. | - To further develop the well-being programme. | |

| Which Strategies & plans will deliver this action? | | |
|---|------------------------|--|
| School Improvement Strategy | HR Strategy | Financial Strategy |
| - Director of SIP will work alongside HR to develop | - Work with AMP SCITT. | - To ensure AMP SCITT remains as an independent, |

| | | |
|--|--|-------------------------------|
| the leadership ladder and succession strategy. | <ul style="list-style-type: none"> - Recruitment & retention strategy. - Succession planning strategy. - Promotion of employer of choice. | viable and effective concern. |
| <p>MAT Lead Officers</p> <ul style="list-style-type: none"> - CEO - Director of School Improvement - Director of HR (Lead Officer) - Director of Finance | | |

Objective 4: Ensuring a financially viable and sustainable MAT.

| Why is this important? | | |
|---|---|--|
| Executive management, Directors and Members have a legal duty to manage the Trust's finances responsibly. Beyond this, we have a moral responsibility to ensure that every penny we spend is in the pursuit of better services for the children we work with and the wider public we serve. We will meet all our legal and moral obligations and be an open and transparent Trust at all times, taking the hard decisions to ensure value for money, regularity and propriety are always self-evident. (<i>Academy Trust Handbook</i>). | | |
| Indicators of success | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| - The Trust has a detailed 3-year medium-term financial strategy in place for each school linked to a fully costed school improvement plan. | | |
| - The Trust has a Reserves Policy in place with sufficient reserves to mitigate areas of high risk across the Trust. | - Reserves of 2-5% are secured | - Reserves of >5% are secured together with investment strategy outlining priorities |
| - To set a budget for expenditure of money to support MAT wide School Improvement initiatives. | - Rolling programme of continuous improvement ensuring any high-risk areas identified by Audit and Finance Committee are addressed. The Trust has fully audited annual accounts published in line with ESFA | |
| - Ensure staffing structures are affordable, sustainable, and fit for purpose. Ensure School Improvement Plans are costed, affordable and sustainable. | - Developing our people – to ensure suitably qualified/skilled staff throughout all finance and School Improvement functions. | - Rolling programme of continuous improvement of our people ensuring skills are up to date & latest systems and processes. |
| - Increase/maintain pupil numbers to maximise funding. Negotiate with LAs to ensure Top up funding is secured. | - Identify additional funding streams where appropriate and bid for additional revenue. | - Employ a bid writer with aim of them being 'cost neutral' and securing a number of successful bids to enable investment. |
| - Procured services have been reviewed (HR, Payroll, Accountancy, FMS etc.) with recommissioning undertaken. | - There is comparable financial data with other schools nationally of same designation which allow for accurate benchmarking. | - Rolling programme of Continuous Improvement using Benchmarking and self-review to drive further efficiencies. |
| - To continue to review the re-charge model. | - To continue to review the re-charge model. | - To continue to review the re-charge model. |

| Which Strategies & plans will deliver this action? | | |
|--|-------------|--|
| School Improvement Strategy | HR Strategy | Financial Strategy |
| - Costed School Improvement Plans | | <ul style="list-style-type: none"> - Overall financial plan - Audit & Finance Committee work plan - Costed Project Plans - Capital Investment Plan - SMRA action plan |
| MAT Lead Officers | | |
| <ul style="list-style-type: none"> - CEO - Director of Finance (Lead Officer) | | |

Objective 5: To further develop quality governance across the Trust.

| Why is this important? | | |
|--|--|--|
| <p>It is important that we have highly skilled, committed, and confident members, Directors and Governors to provide strong strategic leadership which leads to robust accountability oversight and assurance for educational and financial performance.</p> <p>Effective governance is based on six key features: Strategic leadership that sets and champions vision, ethos, and strategy. 2 The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 and the Academies Financial Handbook 2019 Accountability that drives up educational standards and financial performance. People with the right skills, experience, qualities, and capacity. Structures that reinforce clearly defined roles and responsibilities. Compliance with statutory and contractual requirements. Evaluation to monitor and improve the quality and impact of governance.</p> | | |
| Indicators of success | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| - Review the existing model of governance. | - Embed the new articles. | |
| - Ensure a full complement of Directors and Governors across the Trust. | - Further develop a bank of governors waiting to join LLT. | |
| - Establish a detailed training plan for all levels of Governance | - Ensure key training points are established for governors e.g., induction, mentors, safeguarding, skills gap. | |
| - Embed the new metrics for Outstanding Governance e.g., attendance, 360° NLG reviews. | | |
| - To secure a full external Governance review ahead of expansion. | | - Secure another Governance review. |
| Which Strategies & plans will deliver this action? | | |
| School Improvement Strategy | Governor Strategy | Financial Strategy |
| - | - Project plan. | - Fully costed project plan integral to MAT development plan |
| MAT Lead Officers | | |
| - CEO - Senior Clerk to Governors (Lead Officer) - | | |

Objective 6: To provide learning environments of the very highest quality.

| Why is this important? | | |
|---|--|--|
| Students are greatly impacted by the learning environment – this includes behaviour and wider aspects but equally an inspirational building can contribute to learning. Our classrooms and schools, therefore, need to be conducive to learning. A leaking roof, undersized classrooms, poor heating are direct obstacles in the way of a school's success. Physical environment that shows no sign of care or pride can communicate the wrong message (<i>Rowan Moore, Rick Jones 2018</i>). | | |
| Indicators of success | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| - To ensure the smooth closure of Studio@Deyes | - School closed | - |
| - To produce at least one successful CIF bid to improve stock | - To produce 2 successful CIF bids. | - To produce at least one successful CIF bid. |
| - To deliver a planned maintenance programme to improve stock. | - To deliver a planned maintenance programme to improve stock. | - To deliver a planned maintenance programme to improve stock. |
| - To ensure compliance and risk reduction. | - To ensure compliance and risk reduction. | - To ensure compliance and risk reduction. |
| - To ensure the effective planning and development of the plans for the new build at Deyes High School. | - To ensure the effective development of the new build. | - To ensure a safe and effective handover of the new build. |
| - To devise, cost and plan the strategy for 'Bring Your Own Device'. | - To implement the strategy for 'Bring Your Own Device'. | - To monitor and evaluate strategy. |
| - To develop a revised 5-year estates plan. | - Implement the revised 5-year plan. | - Continue to implement the plan. |
| Which Strategies & plans will deliver this action? | | |
| School Improvement Strategy | HR Strategy | Financial Strategy |
| | | - Costed plans as appropriate. |
| MAT Lead Officers | | |
| <ul style="list-style-type: none"> - CEO - Director of School Improvement - Director of HR - Director of Finance - Director of Operations (Lead Officer) | | |

Objective 7: Developing new partnerships.

| Why is this important? | | |
|--|---|--|
| As we mature, developing new "critical" partnerships are essential if we are to succeed in the delivery of the rest of our strategic objectives. New partnership developments include: more schools joining the Trust; developing high-trust relationships strengthening our CPD provision and establishing formal enterprise links. | | |
| Indicators of success | | |
| Year 1 (21/22) | Year 2 (22/23) | Year 3 (23/24) |
| - The Trust has effective links with one or more Teaching School Alliances. | - The Trust is working towards becoming a Centre of Excellence for School Workforce development at all levels. | - The Trust is a recognised Centre of Excellence. |
| - The Trust has become a provider of choice for other schools in regard to specific training and CPD provision. | - Improved CPD provision. | - Enhanced CPD provision. |
| - The Trust has formal partnerships with other MATs and schools to enable robust self-assessment and improvement. | - The Trust has broadened the directory and commissioning model in place which facilitates cutting edge MAT improvement strategies to be developed. | - The Trust Commissioning model is enabling and evidencing sector leading self – improvement. |
| - At least 2 good or outstanding schools are working closely with LLT. | - Further 2 schools have joined the MAT. | - Further 2 schools have joined the MAT. |
| - The Trust has formal relationships with established enterprise partners. | - The Trust, providers of HE and formal Enterprise partners have co-produced new pathways into employment for students. | - The trust, providers of HE and formal Enterprise partners have coproduced new pathways into employment for young students. |
| - To further develop the capacity of the SCITT. | - To further develop the capacity of the SCITT. | - |
| - To launch Vortex House as the 'LLT Teacher of Education' and further develop the CPD of excellence. | - To further embed the training offer at the LLT Teacher of Education. | - To further embed the training offer at the LLT Teacher of Education |
| Which Strategies & plans will deliver this action? | | |
| School Improvement Strategy | HR Strategy | Financial Strategy |
| - MAT School Improvement Action Plan. | - | - 3-year central MAT budget plan will ensure resourced |

| | | |
|---|--|--|
| | | central MAT that can invest in new partnership developments. |
| MAT lead Officers | | |
| <ul style="list-style-type: none">- CEO (Lead Officer)- Director of School Improvement (Primary Lead Officer)- Director of Finance- Director of HR- Director of Operations | | |

Key Objectives 2021/ 2022

SCHOOL IMPROVEMENT

- 1) To ensure a full and extensive pandemic recovery plan is developed in each school.
- 2) To ensure that we remove the barriers for disadvantaged students to make better progress and close the learning gap.
- 3) To review and embed the Maths programme across the schools to ensure improved performance.
- 4) To develop a Trust wide innovation project centred around ambition and achievement (Project A).
- 5) To continue to provide a comprehensive CPD offer to address school need and which is offered more widely through the SCITT and Teaching Hub. This will demonstrate impact internally and externally.
- 6) To continue to ensure senior and middle leaders are held tightly to account for student performance and follow the Leverage Leadership programme.

OFSTED RATING

- 1) To secure a 'Good' inspection at CSSA.

STAFFING AND LEADERSHIP

- 1) To further promote the succession planning strategy that retains high quality staff, shortages etc.
- 2) To promote staff well-being that produces a love of learning and improved staff attendance.
- 3) Establish lines of wider stakeholder feedback that identifies patterns and trends of positivity.

CAPITAL & OPERATIONS

- 1) To ensure an effective new build programme at DHS.
- 2) To revise the 5-year estates plan.
- 3) To revise the ICT strategy to introduce the 'Bring Your Own Device' strategy.

GOVERNANCE

- 1) To review the articles of association.
- 2) To maintain full board and ensure attendance exceeds 95%.
- 3) To devise a comprehensive Governance training plan.
- 4) To undergo a full external Governance review.

FINANCE

- 1) Finances indicate a year-on-year improvement.
- 2) To continue to evaluate the re-charge model against top-slicing.
- 3) To map the finances carefully to school improvement.

GROWTH & EXPANSION

- 1) To further develop:
 - a. The SCITT Centre at Vortex House to support T&L within and beyond the Trust.
 - b. To continue to develop the Ashton sub satellite centre and ensure it is compliant and successful.
 - c. To further develop the Wirral & Southport training hubs/cluster.

- 2) To develop the newly launched LLT Academy for Teacher Education at Vortex House to incorporate a broad CPD offer.
- 3) To develop a Primary expansion strategy.
- 4) To ensure the successful development and governance of Lydiate Services Company and CITC.

Key Performance Indicators 2021/ 2022

SCHOOL IMPROVEMENT

- 1) To review the individual school recovery plans and ensure recovery is on target.
- 2) To monitor the disadvantaged performance with a specific focus on zero NEETS.
- 3) DHS & CSSA continues to be above national average in all indicators for Maths.
- 4) To introduce Project A and monitor impact closely to achieve termly milestones e.g., % engagement.
- 5) To further develop strong teaching across the Trust using training on 'Leverage Leadership'. The percentage formal observation lessons graded good/ outstanding increases.
- 6) To increase % attendance at both schools including improvement in PA.

OFSTED RATING

- 1) To secure a 'Good' Ofsted rating at CSSA.

STAFFING AND LEADERSHIP

- 1) The number of staff leaving due to promotion and retirement is greater than all other reasons for leaving the Trust.
- 2) A well-being package is in place and improved staff attendance is achieved.
- 3) Stakeholder feedback identifies trends of positivity.

CAPITAL & OPERATIONS

- 1) The new build at Deyes remains on track and is successfully completed. All milestones are successfully achieved
- 2) The 5-year plan is revised. The GEMS checklist is used as a measure.
- 3) To devise and cost the 'Bring Your Own Device' strategy.

GOVERNANCE

- 1) To review and implement the revised articles of association.
- 2) To maintain full boards and ensure Governance attendance exceeds 95%.
- 3) A Governance training plan for 2021/22 is in place and Governors attend the training.
- 4) A full external review of Trust Governance is completed and an action plan devised.

FINANCE

- 1) Finances are mapped carefully to school improvement.
- 2) To maintain reserves at 3-5 % and cash flow remains positive.
- 3) The re-charge model is reviewed.

GROWTH & EXPANSION

- 1) To increase recruitment at the SCITT.
- 2) To develop the Primary growth strategy and support at least one Primary school.
- 3) To embed CITC as successful and ensure it is financially viable.