

THE LINK ACADEMY TRUST

# BUSINESS PLAN 2020-21



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## Vision, Culture and Ethos 2020-21

**Portfolio Holder: Isabel Cherrett (Nicky Dunford- for continuity after December 20)**

### Core Principles:

As a successful Trust we must have a clear and compelling Vision for the future that is easily accessible for all, from which we build our culture and ethos.

All stakeholders must be able to articulate what the Trust stands for: its moral purpose, its mission and its values. These have been established through a process of consultation and reflection with all stakeholders which we seek to regularly review in light of any changing circumstances, particularly this year with the constraints of the Covid 19 pandemic.

Clarity and simplicity of the Trust's vision is paramount to ensure a shared understanding of what it means to be part of the Link Academy Trust, including those elements that are non-negotiable.

Schools and organisations seeking to join the Link Academy should be fully aware of the vision, culture and ethos of the Trust and fully uphold these principles.

There is an expectation that the vision of the Link Academy Trust is fully implemented in all Academies to have a direct impact on student outcomes, which are closely monitored.

Sustainable school improvement is driven by the Link Academy Trust Vision, Culture and Ethos- the highest level of pupil outcomes is an expectation in every school, at every level and for every child.

We educate the whole child.

We are stronger together.



### Vision, Culture & Ethos 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
Review and update the Trust's Vision and Values.	Vision Document for 2020-21 reviewed, compiled and published with stakeholders' involvement in the presentation on the website.	CEO, E/AH & Trustees collaborate & approve updated documents	1 Sep 20 INSET Day all Trust Staff online consider V&V to project this year's priorities	Published Revised Documents will be available to all stakeholders that clearly set out Trust Vision, Culture & Ethos with the individual schools adding their unique approach.	
	Away Day or Online session to complete the review	Trustees/ Governors/ E/AH Away Day £300	Trustees' Away Day – Spring 21	They will be presented in video, interview and photo montage etc for the website to reflect the dynamic approach of the Trust	
	Consider a more vibrant approach to putting it on the website- involving stakeholders: video, photo montage, interviews etc	Team to produce the website document	Spring 21	Published to website	
	Every school to consider how their website reflects their interpretation of the Trust V&V. School leaders will spend time on the V&V at the earliest opportunity to ensure all staff/ pupils are fully aware of the ethos of the Trust in order to develop the culture within their setting  Trust V&V will be explicit and tailored to each school on their website	School Leaders, with stakeholders Governors Parents & pupils  CEO/ EAH and Trustees to consider each website	INSET Sept & follow-up sessions/ staff meetings  Website ongoing but initiated in Autumn Term.	Each school will have a vibrant website reflecting their uniqueness within the overall Trust Vision  Virtual tours, pupil voice, parent contribution as well as educational activities will feature.  All statutory information must be displayed	



Capture the Culture and Ethos through the Student Voice	<p>At an appropriate time within the school year, E/AH and respective Academy Teams to give pupils the opportunity to voice opinions on key issues –</p> <ul style="list-style-type: none"> <li>▪ A safe place</li> <li>▪ Friendships</li> <li>▪ Respect for each other</li> <li>▪ Enjoyment of learning</li> <li>▪ Environment</li> <li>▪ Food</li> <li>▪ Staff</li> </ul>	E/AH with support from Governors?	Spring or Summer term – when the pandemic restrictions do not dominate (albeit temporarily) all that we do.	Strong statement which encapsulates the pupils' perspective (and probably identify some negatives which will provide an action list for E/AH/EIT/SMT).	
Prioritise positive communication of the Trust as the umbrella under which all academies thrive and have significantly improved over the past 4 years and will continue to receive the best support as a result.	<p>Maintain close links with RSC, ESFA and offer support to other Trusts/ schools, particularly small schools (under 250) to develop reputation further</p> <p>Take every opportunity to promote the Trust and ask E/AH to do the same</p> <p>Introduce Press Releases with photos which go beyond Facebook</p> <p>Link with Income Generation – celebrate/ publicise successes, where donor is willing to be identified.</p>	<p>CEO TBM E/AH, particularly EIT IG Co-ordinator</p> <p>Cost of advertising/ Facebook etc £2,000</p>	<p>Message to E/AH at outset</p> <p>CBT to do the same</p> <p>ND, MM, IC to drive this within their own colleagues as far as poss.</p>	<p>Positive promotion of the Trust will be a priority- every opportunity will be taken to illustrate the Trust's role as the overall organisation which ensures the safety of schools and their significant/ ongoing improvement.</p> <p>Financial gains will be explicit</p> <p>School Improvement actions will be promoted.</p> <p>Individual academy successes will be promoted as backed by the Trust.</p> <p>Reputation of the Trust will continue to develop as highly positive particularly as a niche Trust managing the most difficult- small schools with numerous sites, low levels of GAG income etc etc</p>	

## Central Business and Property 2020-21

**Portfolio Holder: Mike Fisher**

### **Core principles:**

The Central Business Team (CBT), led by the Trust Business Manager (TBM) are accountable to the CEO/ Accounting Officer, and through the Central Business and Property Portfolio Holder (CB&PPH) directly to the Trustees of the Link Academy Trust.

The Trust Business Manager line manages and is responsible for the appraisal of the HR lead, the Finance Team Leader, Health and Safety and Premises Lead. He is responsible for all administrative staff within the Trust & Central Business Team (CBT) and is responsible for its day to day operations. The TBM and CBT is expected to regularly prepare information & data for the CEO, CB&P PH and Trustees.

Providing strategic planning in the form of the Strategic Business Plan (SBP), to cover the current year, a 3 year period & 5 year period, is the CEO's responsibility working with the TBM, CBT and the Executive Improvement Team (EIT). Reviewing & evaluating the impact of the previous SBP is also the responsibility of the CEO, TBM and CB&PPH.

All legal issues are managed through the CBT, in consultation with the CEO & TBM.

The role of the Central Business Team includes the management of all financial aspects of the Trust, including fulfilling the requirements of the DfE as outlined in the Academies Financial Handbook. It includes all aspects of budgeting over the current year, a 3-year & 5-year period and accounting practice during the period. This incorporates financial auditing, financial systems and processes, including reconciliation against banking and returns required by the ESFA. This is overseen by the Financial Strategy Policy Holder, monitoring to keep the Trustees fully informed. The CBT consistently liaises with individual schools to ensure budgets meet the needs of pupils in that establishment and as much funding is spent to benefit 'the whole child' as possible. The CBT constantly seeks to provide high quality services & resources at lowest possible cost: best value for money is paramount.

Data relating to the core function of the CBT is its responsibility.

Payroll, HR and personnel files, actions and data are managed by the Central Business Team. CPD, while directed by the CEO, is managed in terms of mandatory training by the HR Officer within the CBT. This is overseen by the Workforce Strategy Portfolio Holder, monitoring to keep the Trustees fully informed.



IT delivery support for the individual academy curriculum, teaching & learning and CPD is the remit of the CBT, including IT audit, planned expenditure, sourcing & delivery/ installation.

Property management is a core function of the CBT, which comprises all maintenance including related service level agreements (SLAs), academy improvements, health & safety management and Condition Improvement Fund (CIF) / further funding capital improvement applications. All property works are the direct responsibility of the TBM within the CBT, including tendering, managing the project and final project checks/ sign off, although some actions are delegated to the Health and Safety and Premise Leads. Accountability for the Capital Planning across the Trust lies with the TBM. The CB&PPH liaises directly with the TBM to support and challenge property decisions and projects, monitoring and reporting to the Trustees

The Link Academy's growth & capacity is the remit of the CEO supported by the TBM and CBT. A flexible but strategic plan sets out the aspirations for the future, alongside offering clear expectation for those seeking to join the Trust.

As part of the Central Team, the CEO, Academy Trust School Improvement Lead (ATSIL) and EIT manages school improvement, CPD and school to school support. Individual academies consider the areas for development in their individual academies and an overall improvement plan is agreed annually to address identified issues; it is reviewed for impact at the end of the year. Similarly, an annual strategic & budgeted CPD plan is agreed which supports the improvement plan. The ATSIL with the EIT leads school to school support programmes against identified needs and seeks to develop these for other organisations to generate Trust income. The CB&PPH reports impact to the Trustees, alongside the CEO.

Income generation is increasingly important as direct school funding from the DfE is becoming significantly reduced. The CBT plans annually to increase income into schools by identifying innovative methods to raise funds, provide resources & services, thereby reducing the impact on school budgets. An Income Generation lead has the remit, one day a week to income generation activities, including bid writing.

The rationale for the CBT taking responsibility for the key functions above is that academies are then fully able to focus on their core principle: to provide a world class education for each and every pupil in the Link Academy Trust.



## The Central Business & Property Plan 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
<b>Catering Provision Improvements</b> To improve & create a fully effective catering service that is best value for money, while consistently improving the quality of 'on site' cooked meals- considering healthy, fresh, organic, local etc  Extend the use of school catering facilities with professional cooks to include a clear & extensive focus on healthy eating & experiences with food – growing & cooking etc.	Move Harbertonford/ Diptford and Stoke Gabriel to an in-house operation.	TBM Minor capital investment required for Harbertonford and Stoke Gabriel. Investigate whether Stoke Gabriel will continue to feed Berry Pomeroy	1 Sep 21 – two terms notice required by Devon Norse, deadline for submission 1 Jan 21	Serve improved quality school meals across all schools.  Where needed kitchens are fit for purpose through refit.  Catering provision is extended to involve pupils in a higher level of understanding around healthy eating, involving them in a programme of food growing & preparation activities- educating the whole child	
	Complete options analysis for provision of meals at Cheriton, Tedburn and Yeoford.  Look into and prepare for Morchard Bishop to supply meals to some/ all three Woodleigh primaries	Phase planning to involve AH, TBM, CEO & CB&PPH  Option to move to Morchard Bishop providing meals for 1-2-3 of the Woodleigh Schools  Trustees agree 'next phase'	Further Dev planned 2020-21	An agreed outcome, with timing planned to improve the provision of meals at Cheriton Bishop, Tedburn St Mary and Yeoford taking into consideration the highly successfully run kitchen joining the Trust in September 2021	
Consider establishing a division of CBT/ person, that is responsible for & manages catering	Agree what a catering 'lead' job description might look like and the hours required to fulfil the post  Explore the opportunity to employ an external 'expert' to make checks to ensure provision of meals is fully compliant with H&S and Food production laws.	TBM & CEO with CB&PPH kept informed- linking with Trustees.  Options analysis:  Self Employed person with sufficient hours to oversee catering across the Trust- improving efficiencies and meal quality. Or	Summer term- ongoing	Possibly- A catering division is responsible for & manages provision of healthy school meals across the Trust on a day to day basis. Line Managing kitchens  Or a temporary solution working towards the above.	

	<p>Decide when it is practical to employ our own Catering lead.</p> <p>Risk Assessments in place- CEO/ TBM &amp; Trust Chair</p>	<p>Directly employing a person to manage provision- hours, timing, job description etc required</p> <p>When this is required.</p>			
<p><b>Increased Income Generation.</b></p> <p>Create a 2020/21 plan using information from previous bids and set targets</p> <p>Look at new aspects not just raising hard cash- i.e. sponsorship, links with business etc</p>	<p>Develop a range of people with expertise to form a working party at various levels to form an IG group to support individual Academies with lower value/level funding applications.</p> <p>Create a detailed breakdown of expectations for 2020-21, with a clear committee structure &amp; terms of reference.</p> <p>Establish various approaches and allocate to specific people to follow through.</p> <p>Maintain records</p> <p>TBM &amp; CEO to oversee &amp; support with ideas etc</p> <p>TBM &amp; CEO continue to network &amp; gather ideas- work with other organisations- setting up higher level sponsorship.</p> <p>Possible specific project</p>	<p>Recruit from PTFAs &amp; school communities</p> <p>Set up a range of ideas to initiate the process.</p> <p>Involve LGBs</p> <p>TBM &amp; CEO action plan their programme</p> <p>E/AH to provide list of additional needs that could be provided from external funding agencies/ charities etc</p> <p>Develop relationships with local businesses i.e. Accountants and maths resources through cleverly worded letter</p>	<p>Working party- Autumn Term</p> <p>Ongoing meetings throughout the year</p> <p>Final overall report to compare with previous years.</p>	<p>A supportive committee of volunteers or equivalent, led by TBM/ CEO will have a strategy to maximise support for funding streams/ businesses to improve services, opportunities &amp; resources for all schools.</p>	<p>Introduce termly PTFA/School/Trust level virtual meeting</p> <p>Link to sponsorship offer 'trial'</p> <p>Advertising flyers sent to local estate agents, distribution to be expanded to other local amenities.</p>

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
<b>Estate Property Improvement Planning- current year, 3 &amp; 5 year</b>  Create an Improvement Plan 2020-21 with actions and supporting documentations such as planning permissions to ensure ability to respond to funding availability. Develop for 3 & 5 years.  Capital Fund spending plan- 5 years  Link phased improvements with high level sponsorship/ fund raising to increase the ability to achieve	TBM & CB&P PH to liaise and oversee Estates Plan, exploring all individual Academy needs.	Cost in line with Capital Expenditure Plan	Autumn Term- Estates Plan shared with Trustees	Estate Property Plan in place- using external expertise.  Successful CIF bid writers have been used.	
	Identify CIF projects and instruct suitable/ successful companies to complete bids.  CB&PPH to be involved & check over.  CIF Process to be completed by TBM for deadline. Appeals as necessary	TBM & CB&P PH CIF Bid companies Trustees kept informed.	December - CIF bids completed.  Outcomes- April 21	CIF Bids to be produced for 2021/22	
	Progress to completion the Ilington Preschool build Management of the build to ensure pupil education / delivery remains effective to enable pupil progress to remain good	TBM with builders/ CB&PPH/ CEO	Part of overall Estates Plan	Successful opening of the facility	27/11/20 – Project sent to DfE Capital team for final funding approval.
	Progress the option of installing a MUGA at Stoke Gabriel - s106 funds available?  Stoke Gabriel Village Hall purchase to accommodate Pre School.	TBM. CEO/ Trustees kept informed TBM to appoint specialists/ FOSS- support TBM to appoint Builders	MUGA completed by summer 2021	Identification of 'other' Projects where '106 funds' can be used to initiate & underway/ completed	
	TBM to identify ongoing maintenance and schedule	TBM / Premises Officer	Holiday periods planned for maintenance work	Maintenance Plans in place and underway in holiday periods	



	<p>Prepare for possible future projects:</p> <p>Looking at Cheriton Bishop as possible new school build</p> <p>Tedburn St Mary- potential use of previous swimming pool space to create a space for Pre School to operate.</p> <p>Widecombe in the Moor- solution to the swimming pool issue</p>	<p>CEO/ TBM etc</p> <p>Be aware of any possible funding routes</p> <p>Priority School Building Programme 3</p> <p>Supporting PTFA's to manage possible projects over time</p>	Future Planning	Being prepared for future focus, particularly funding routes.	
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## Governance 2020-21

**Portfolio Holder: Jane Collings**

### **Core principles:**

The Link Academy Trust has a Scheme of Delegation in place which sets out the responsibilities of the various levels of governance (Members, Trustees & Local Boards). This scheme was fully revisited in 2019-20, to update it in line with the fact that there are now fifteen primary academies within the Trust.

Governors at all levels will benefit from enhanced clarity which sets out their responsibilities, consequently information around expectation of the role will be revisited and clarified. Portfolio positions for all Trustees will reflect a section of the Business Plan for 2020-21 and clarity over expectations and actions will be developed this year. Local Board governors will continue to meet to reflect on actions and findings in Academies every half term in order to create a consistent system of Learn, Support and Challenge which will ensure every aspect of Governance is visited in a timely way. The conduit for findings to be presented to the Board of Trustees is through the Standards and Curriculum Committee and this too will continue to be refined and improved.

There are formal processes for recruitment of governors and trustees at all levels, following which an induction process with a 'buddy' at Local Board level and through familiarisation with protocols at Trustee level. Regular training for all Trustees and governors is available and the expectation is that governors and Trustees avail themselves of the most appropriate training to ensure effectiveness. Continued recruitment to ensure all Governance is at capacity is ongoing and focuses on the skills required to create a balance of knowledge and understanding to ensure all levels of Governance are effective. The recruitment process remains robust.

The Diocese has a strong presence within the Trust, seven of the twelve Trustees are expected to be Foundation Directors or where numbers are less than this the ratio is maintained. The Link Academy Trust has designated one Trustee with the specific duty to link closely with the Diocese and keep them fully informed. Similarly, of the five Members there are three that represent the Diocese through corporate bodies.

The Trust will be supported by a professional clerk who will receive regular training and updates to enable that person to accurately support and advise Governance. At least one Away Day offers the opportunity for Trustees, Local Boards and Executive/ Academy Heads to explore, collaborate and make Trust-wide decisions. Governance personnel from Members to Trustees and Local Governing Boards are highly skilled and dedicated to the academies within the Link and we are grateful for their voluntary services which ensure our children receive the best education we can offer.



**Governance Plan 2020-21**

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
<p>To ensure all positions of Governance are filled and members, Trustees and Governor are at capacity.</p> <p>Recruit personnel with specific skills to ensure all levels of governance are operating at a highly effective level and all skills required are in place</p>	<p>Review the Overall Governance Structure and the number of personnel/ skills required- use Audit findings.</p> <p>Identify the number of personnel needed at Member, Trustee and Local Governance level, together with skills and put recruitment processes in action throughout the year.</p> <p>Conduct a skills audit update. Ensure appointment process is robust.</p> <p>Complete an induction schedule.</p> <p>Peer support network to support new starters Training opportunities established to ensure skills are in place.</p> <p>Skills Audit at LBs level .</p>	<p>Review the Governance Need ND, IC, RG &amp; CM and create a plan for actions</p> <p>ND to initiate recruitment through Academy Heads and Senior Leadership etc</p> <p>Interviews and Induction: IC, ND, RG &amp; CM as suitable volunteers are found.</p> <p>Local Boards- ND/ E/AH to seek Governors and work with ATSIL to appoint &amp; support- E/AH to have a primary role in recruiting a parent, member of staff and community member for their school.</p> <p>Moorland individual Local Boards to become an effective Hub in preparation for 2021</p>	<p>September start-recruitment</p> <p>Ongoing half termly meetings with Local Board representatives &amp; ATSIL to improve practice and effect induction</p>	<p>There will be Five Members in place and practice will be extended to ensure a deep understanding of Trust operation.</p> <p>Appointments to the Trustees Board will ensure there are no skill 'gaps' and the Trust Board will operate at capacity with the correct ratio of Foundation Trustees</p> <p>Local Governing Boards will have a full complement of effective volunteers in each specification- parents, staff, community and Foundation. Each Board will be supported to effectively support school provision particularly Teaching &amp; Learning.</p> <p>Sarah Clarke, ATSIL will work with Local Boards to ensure they operate effectively. Induction for all Governance roles will be highly effective</p>	
<p>To further develop Trustees involvement in improvement priorities for 2020-21</p>	<p>Review the specification for the portfolio Holder in order to establish effective &amp; supportive actions, understanding etc.</p> <p>All new Trustees to have an induction programme, access to all appropriate information and a mentor</p>	<p>Autumn Term Business priority plan discussions with set priorities</p> <p>CEO &amp; Chair to work with Members</p>	<p>Started September to be completed by the end of the Academic Year</p> <p>RAG rated for the next year to ensure completion</p> <p>Phased approach</p>	<p>Members, Trustees &amp; Governors will know how they can have most impact.</p> <p>Trustees will focus on a designated area set out as a Portfolio, enabling them to take specific areas of responsibility; using systems, policies and</p>	



Continue to embed a clear understanding of Trustee Portfolios and continue to develop working partnerships to lead improved practice across the Trust	Portfolio Holders further develop their involvement and are in a position to challenge in more detail and report at the meetings. Trustees and Governors to develop remote monitoring in times of COVID Local Governors similar roles to be further developed through the Working party meetings	Directors, CEO, EP, E/AH to work with LB No cost  Director Recruitment- Governor recruitment-		specific personnel to ensure the impact of their contribution.	
<p>Improve the communication conduit from Local Boards to the Standards &amp; Curriculum committee to ensure 'eyes and ears' work of local governors is effectively considered at Trust Level.</p> <p>Ensure the effectiveness of all Local Boards, including new joiners</p>	<p>ATSIL will work with E/AH to ensure the capacity and make up of each Local Board is maximised.</p> <p>A range of skills will be sought for every Hub</p> <p>Regular LB working group meetings underway with a plan to review the previous half term monitoring and prepare for the coming half term monitoring. This will be linked with Trust-level monitoring and individual Learn, Support and Challenge days. Continue to improve. Link with School Improvement and EIT actions.</p> <p>Local Board reporting will be given precedence at S&amp;C meetings</p> <p>ATDL, Andy to support effective use and understanding of what can be achieved through the use of Power Bi</p>	<p>ATSIL- SC and LBs</p> <p>S &amp;C- Agenda setting</p> <p>ATDL Andy to deliver training</p> <p>No specific costs</p>	<p>Regular meeting dates in place on the Governance Calendar.</p> <p>Plan in place to develop over the course of the Academic year.</p>	<p>The Local Boards will be well structured and as far as possible at capacity with a range of skills, time and enthusiasm to provide Trustees with valid information from school level on which to make pertinent and accurate decisions.</p> <p>Improved methods of information gathering and reporting by Local Boards through ATSIL workshops linked to the EIT school improvement priorities will be evident. Regular Sarah Clarke working group meetings will facilitate this.</p> <p>Clear opportunity will be made for governors to inform Trustees at S&amp;C meetings of issues affecting schools and feedback from Trustees to LBs improved</p> <p>The development and improvement of the use of Power Bi (Data reporting) with support from the ATDL-Andy Keay will be evident.</p>	

## Financial Strategy and Control 2020-21

**Post Holder: Roy Gillard**

### **Core principles:**

Financial Strategy & Control is the responsibility of the Central Business Finance Team, under the direction of the Trust Business Manager and the CEO/ Accounting Officer. The Finance Strategy and Control Post Holder (FS&CPH) is the trustee responsible for Finance that liaises directly with the day to day operation of the Central Business Team, supporting decision making and reporting to the Trustees.

All financial actions are undertaken in accordance with the guidance provided in current Academies Financial Handbook (AFH) under the direction of the FS&CPH and Finance and General Purpose committee. All policies related to financial management and control, including the Register of Business Interests are maintained and reviewed regularly to ensure compliance and good financial practice.

The Link Academy operates the HCSS budgeting & accounting software programme, which enables transparency across the Trust. Trustees and Senior Leaders of the trust have appropriate access to financial information at all times. There is an expectation that this now includes HR & payroll provision.

A balanced budget aligns with identified areas of Academy and Trust improvement priorities and this is approved by Trustees- it is an expectation that we achieve an 'in year' balance of income against expenditure. Expenditure is consistently and robustly monitored every month against the budget for individual Academies as well as the Trust as a whole and this information is provided to Trustees. Academy Heads are supported by the Trust Business Manager to ensure they remain in a 'balanced' position. A visual report is regularly provided by both individual Academies for comparison and the overall Trust position to Trustees, called the Month End Report.

Benchmarking and KPIs are used to rate performance of the Trust. Improving analysis of the financial position is constantly being refined as the three and five year budget are scrutinised in depth and ensure actions that may need to be put in place are done so before there are any significant issues.





Internal Audits focus on financial processes & procedures quarterly across the CBT and all individual academies are scrutinised to ensure compliance with the AFH. External audits take place to support continued improvement of financial processes and procedures throughout the year, alongside the preparation of accounts submitted to the DfE. The reports from both parties are scrutinised by the Board of Trustees and appropriate actions are undertaken. A timetable for all financial control deadlines are maintained and met. The audit committee take responsibility for ensuring systems and procedures are fit for purpose and compliant with the AFH.

Risk assessment is an ongoing process which continues to be further refined to ensure there is an accurate and responsive system to monitoring risk as circumstances change. Trustees are involved with close monitoring of the risk assessment records and regularly challenge the CBT to ensure a comprehensive and accurate understanding & mitigation plan is in place. When schools join the Link Academy Trust a robust and rigorous Due Diligence procedure is undertaken which identifies both any financial or 'other' risk and the ability for the Link to manage that risk.

It is the responsibility of the CBT to ensure effective use of economies of scale achieves best value for money across all purchasing across the Trust, adhering to the Finance Policy and spending limitations authorisations.

Income generation is also the responsibility of the CBT to establish new revenue streams that benefit the Trust as a whole and individual academies/ projects. The designated post holder for this position provides termly updates against the income generation targets set and supports individual Academy Parent/ Teacher/ Friends Associations to raise funds for individual settings too.

The strategic plan covers the current year, 3 & 5 years.

A growth & capacity plan addresses sustainability and expansion of the Link Academy Trust, in line with financial sustainability.





## Financial Strategy and Control 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
Continue to improve all Financial reporting systems to ensure a monthly review of all individual Academies	Continue to investigate improvements to the month end reporting process whilst ensuring full compliance with latest guidance. To be discussed with Chair of F&GP and CEO monthly	CEO TBM Chair of F&GP	Monthly	Financial Reporting will fulfil the requirements of the Board of Directors and be further enhanced by monthly reports enabling deep scrutiny & comparison	
	Internal & External auditors' recommendations will continue to be sought & rapidly acted up, reports are received every term. Actions are followed up by the Audit Committee	Chair of Audit Committee Bishop Fleming - External Griffin - Internal TBM	Throughout the year	Nil non-compliance issues raised	
	Continue to develop use of ICFP & Benchmarking information to Trustees.	TBM Chair of F&GP	Trustee meetings every half term	ICFP, KPIs, & Benchmarking data will be more detailed & available to Trustees in a format which enables highly effective monitoring	
Ensure current financial system remains 'fit for purpose' and that processes are robust and sound.	Investigate increased automation of the finance system by comparing to other products on the market.	Chair F&GP CEO TBM Bishop Fleming	End of summer term	Board of Trustees provided with reassurance that the current system is meeting the needs of the Trust.	HCSS Automation demo booked 8/12/20
To continue to make the highest level financial provision for Schools joining the Trust ensuring effective systems ensure BVfM enabling schools to provide highly effectively for pupils.	Due Diligence process identifies where financial focus needs to be- including re-setting of budgets etc	CEO & TBM with E/AH.	Ongoing process	Schools joining the Trust will be fully supported and the financial position will not impact adversely on educational provision	

Continue to review the Financial Expertise on the Board of Trustees and develop further.	Recruit further financial expertise onto the Trust Board.	CEO & Chair of Trustees/ Trustees to interview Process- HR Officer (Academy Ambassadors)	Ongoing process	Ensure Financial expertise at Trustee level is of the highest quality and can support and challenge Trust practice	
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## **Growth & Capacity 2020-21**

Portfolio Holder: Nicky Dunford

### **Core principles:**

The Link Academy Trust have an annually updated, defined strategy for Growth as it is important to build capacity in advance of new academies joining the Trust. This plan enables Trustees to be confident that the Trust has a planned approach and is fully prepared for the challenges posed by the different types of joiner. We are a Multi Academy Trust of 15 small primary schools ( October 2020) focussed on: primary schools, converters and sponsored schools, Foundation or Maintained, Federations of and individual small schools, including Church- CV or CA and Community schools. We have a high level of experience and success in rapidly improving and running these establishments.

We were approved as a Support Academy in 2018-19 but have yet to be asked to support a school requiring sponsorship, however we are currently working with five schools requiring rapid and strong support which joined us last year. Our vision linked to the Growth and Capacity plan for the Trust ensures that the impact new joiners have on the overall organisation is thoroughly considered. We reflect on geographical coverage and many other factors to ensure all schools benefit and we are prepared to say 'no' where necessary, especially if this should jeopardise or destabilise the organisation in any way.

We have established effective mechanisms for transitioning new academies into the MAT and have used Management Partnership agreements to initiate work with Federations of schools as well as individual primaries prior to Academisation and find this is a highly successful route for the Trust and new joiners.

The Growth of the Link Academy Trust continues to be a priority in 2020-21, in line with our Trust Values and Vision for the future. The importance of a 'planned' strategy for growth is paramount as we maintain consistently high-quality provision for all academies and welcome others to create a diverse and dynamic organisation providing the very best for our young people. Our history of growth to date has shown the Trust steadily growing by more than three schools per year which has been a highly successful pattern of steady development, however we now feel sufficiently stable as an organisation to increase the rate of growth as well as looking at encouraging larger primaries to become part of the Link Academy Trust.

As part of the plan, governance, leadership and business structure will come under scrutiny and review will ensure changes are made where necessary to facilitate effective and high-quality provision across all establishments. We have developed our Central Business Team structure over the past year and will continue to do so should more than three schools join the Trust this year.

School Improvement planning will always be crucial and at the centre of Growth but remains external to the Strategic Business Plan. A Senior Leadership Team focussed on School Improvement was established last year which ensures we continue to develop an effective 'offer' for those considering joining the Link Academy Trust.

### Future Expectations:

The table below illustrates how we expect to grow from the current position and the additional grid reflects the pattern of growth to date from 6 small primaries, with under 500 pupils, in 2016-17.

### Planned 5 year Growth Expectation:

	<b>2019-20</b>	<b>2020-21</b>	<b>2021-2022</b>	<b>2022-23</b>	<b>2023-24</b>
Number of Schools	12 (3 joined Oct 19)	15- 18 Consolidation/ additional 3	18- 21 Further schools including MB	21- 24 Further growth of 3	24....
Number of pupils	Approx 900	1,200- 1,600	1,600- 2,000 plus	2,000-2,500	

  

	<b>2016-17</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>
Number of Schools	6 – Totnes & N&T federations	6- Original General Election- purdah	9- addition of Woodleigh Federation	12- addition of Raleigh Federation 2 schools- Drakes and Otterton, also Broadhempston. Re- brokerage of South Dartmoor Valley Primaries completed Feb 20	Addition of Morchard Bishop (MP, conversion 1st Sep 20)  Further 2 schools a possibility. Increase number of Pre Schools & capacity
Number of pupils	472	472	702	1, 238	1,500 plus

In order to achieve increased figures the Trust will have a Growth plan, alongside the capacity plan.

### Organisation

As the number of academies joining the Link Academy Trust increase we anticipate the development of two geographically located Hubs, south of Exeter and North/ East of Exeter. A senior Leadership Team have been established to support all individual academies with the Trust Offer, the hours and roles within this group of leaders will expand as the Trust grows with a number of specialist teaching teams developing: The Improvement Hub, RE & SIAMS lead/ support and The PE Team.

The Central Business Team Has also developed further to include a dedicated HR Lead, additional finance staff, a part-time Income Generation post, a Health and Safety co-ordinator and a Premise lead. Catering is slowly coming 'in house' as we develop a catering team. Every part of the organisation will need to be assessed against the financial cost to ensure the overall financial position remains buoyant.



## **Benefits to support Growth of the Link Academy Trust include:**

- Raising the profile of The Link Academy Trust within the Education sector and the RSC
- Raising the profile of The Link Academy Trust within the local, regional & national community
- Marketing- including Unique Selling Points (USP), networking with potential schools & federations, presenting to potential stakeholders etc
- Offering a supporting role to schools as a Sponsor Academy
- Offering and operating effective systems of school improvement and excellence support i.e. Improvement & Inclusion Hub
- Offering and operating effective financial and business systems, including income generation
- Offering and operating property management support, including highly effective CIF bid writing and ongoing site maintenance.
- Working with Teaching Schools Alliance to offer high quality CPD for all stakeholders including training from within the Trust' expertise to addressed clearly identified need.
- Documentation in place to facilitate school joining- including a detailed due diligence process.
- Growth & Capacity planning will ensure a consistent and systematic support programme to ensure the addition of schools will only be beneficial.

## **Capacity**

### **Core Principles:**

Capacity within every individual academy will be a focus for the Executive/ Academy Head as it reflects the effectiveness and reputation of the individual school alongside its proximity to residential areas.

All school communities will be expected to communicate highly successfully with their 'customers'- pupils and families, thereby operating as close to full capacity as possible.

Capacity will be monitored and good practice shared.

Capacity will be aided by enhanced Early Years provision wherever this is viable.



## Growth & Capacity Plan 2020-21

### Priorities highlighted

CAPACITY					
Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
<b>To continue to develop the capacity of individual academies within the Trust, focusing on Pre School provision, identifying 'other' areas of development according to the individual setting to extend the PAN where possible.</b>	Schools will consistently, positively promote their provision to achieve capacity. E.g. Open Day Videos available on website  Continue to develop online presence Local reputation in the community Invite local groups to visit etc. Share effective actions	Executive/ Academy Heads (EA/AH) with Admin support-  Class teachers involvement with community	Throughout the year	Schools will continue to show an increase in pupils on roll.	26/11/20 – All schools have posted virtual tours online and promotional material to social media and boosted as advertisements.
	All pre-school sessions to be extended in schools where this is viable.  All operating at capacity, Stoke Gabriel Pre School to join the Trust before the end of year  Consider the viability of a shared Pre School- Broadhempston & Landscope.  Raleigh Federation schools in East Devon revisit Pre School provision.  Set up voluntary run Mothers and Toddlers Groups where possible in every academy.	Develop capacity within the facility as soon as possible. E/AH- ND to work with identified academies.  TBM to support financial viability & E/AH & Admin.  Establish Early Years Champions to promote the provision	Initiate Sept 2020- evaluate termly  SG conversion completed by Spring term	Extension of Pre-school capacity, i.e. Operating 10 sessions per week with a consistently high uptake. New provision established	



	<p>Evaluation of current position</p> <p>Promotion of facility planned- to include videos, Facebook etc</p> <p>Community participation and Local press promotion.</p> <p>'Expert' support to improve provision</p> <p>Forest School approach promoted for all EY provisions and advertised in local press.</p>	<p>TBM to discuss and support AH.</p> <p>EY champions support</p> <p>Suggested online promotion supported</p>	Action Plans in place for identified schools	Recent joiners supported to increase their capacity both in school and pre-school	
<b>GROWTH</b>					
<b>Objective</b>	<b>Actions</b>	<b>Who? Cost? Detail</b>	<b>Date</b>	<b>Success Criteria</b>	<b>RAG – Commentary of progress towards objective</b>
<b>Create a Growth plan, setting up supportive practice with other schools/ groups of schools/ academies.</b>	<p>Review all promotional documentation to ensure the Link Academy ethos etc is transparent. Actively speak to Trusts that are vulnerable</p> <p>Keep in close contact with Diocese and RSC- keep them up to date with our position</p> <p>Complete any Eols that are within our 'area' and apply. Work with the Diocese to identify schools/ organisations to approach</p> <p>As Above RSC-</p> <p>Network with other schools etc</p> <p>Develop a good network of contacts- including development of business contacts – including continued closer working with DfE.</p>	<p>CEO &amp; TBM to produce documentation, Eols as required tailored to need, SoD review etc</p> <p>Set up good links with the Diocese and RSC</p> <p>Map out schools and areas</p>	September-onwards	Contact made and working with other schools and organisations with a view to joining the Link.	<p>MAT Review 30.9.20</p> <p>CEO Diocese meeting online</p> <p>Make connection with Acorn Academy</p> <p>RSC lead 6.10.20</p> <p>Anthony Power meeting set up Oct.</p>
<b>To work with at least three new schools in order to increase the number of schools within</b>	<p>Work with CS (Head of MB) to align schools and prepare for conversion.</p> <p>SLT to support MB</p>	<p>CEO, TBM &amp; SLT</p> <p>Start the conversion process with Legal.</p> <p>DD process etc</p>	Sept onwards	Management Partnership arrangement operating successfully.	Meetings in place- supporting with Pre School.

<p><b>the Trust over the 2020-21 Academic year, including Morchard Bishop to ensure transfer into the Trust in September 2021</b></p>	<p>Local Board to work towards integration with Woodleigh.</p> <p>Identify schools in Plymouth Area which may require support that reflect Link V&amp;V</p> <p>Contact small schools we have been in contact with us the past to see if we can start to work with them.</p> <p><b>FORT Federation</b> - (Awliscombe C of E and Payhembury C of E) Penny Hammett Email: headteacher@fort.devon.sch.uk Payhembury tel 01404 841291</p> <p><b>Halberton &amp; Uplozman Federation</b> - (Uplozman C of E and Halberton) Stephen Badcott Email: head@uplozman-primary.devon.sch.uk Halberton tel 01884 820585</p> <p><b>The Valley Partnership</b> - (Burlescombe C of E and Webber's C of E) Deborah Eveleigh Email: head@webbers.devon.sch.uk Burlescombe tel 01823 672521</p>	<p>SC</p> <p>CEO</p> <p>CEO Invite to talk</p>		<p>Contact made with 'other' schools that wish to join the Trust</p>	
<p><b>Continue to enhance the reputation of the Link Academy Trust within the Education Sector.</b></p> <p><b>Create a clear offer for schools joining the Trust</b></p>	<p>Create a plan of support and speak to influential bodies- RSC, Diocese and LA to approach those seeking help</p> <p>Website enhancement to reflect a successful Trust with a clear 'offer' to schools/ organisations considering joining</p> <p>Significantly improve School Improvement offer within the Trust in order to attract Federations.</p> <p>Promotional material to reflect this.</p>	<p>CEO &amp; TBM Meetings set up and regular contact established</p> <p>Website review- CEO &amp; AT Admin</p> <p>CEO &amp; SLT</p>	<p>Throughout The year</p> <p>Sept/ Oct and review termly</p> <p>September onwards</p>	<p>Supporting other schools/ organisations</p> <p>A Link Academy Trust 'offer' clearly available on the website and to any Trust requiring support</p>	



## Quality Assurance & Data 2020-21

**Portfolio Holder: Jason Hayward-Jones**

### **Core principles:**

The Link Academy Trust uses a wide range of qualitative and quantitative data in order to fully assess the performance of individual academies, the central business centre and the Trust as a whole. The portfolio holder is expected to support all aspects of managing, accessing and employing this information.

The Executive Improvement Team (EIT), established in September 2020 together with the CEO, provide strong systems for peer review and support across the Trustee. The established system of support includes:

- Learn, Support & Challenge visits involving Governors,
- Individual mentoring support for Academy Heads,
- An Early headship programme of half termly training sessions,
- Ofsted preparation days alongside
- A rigorous AH appraisal system.
- AH also work in groups of three in a critical friend role.
- Other bespoke support areas as required

This further enables the highly effective management of school improvement risk. Scrutiny is a regular planned action and intervention happens swiftly when there is any indication that performance levels within an academy drops below expected standards. A priority support plan is established for every individual school, even those that just require minimum involvement .

A comprehensive data dashboard underpins school performance across the Trust and draws from SIMs, the Trust' Management of Information System (MIS), which provides consistency in reporting across all the academies. The newly established programme, Power Bi is bespoke to Trust needs and is maintained and scrutinised by the Data and Assessment Lead to support the work of the EIT in their role to oversee, monitor and analyse in-year performance in terms of pupil performance and learning across the organisation. The Trustee with the Quality Assurance and Data portfolio will work with the EIT to ensure the system is fully utilised to provide an efficient and increasingly comprehensive structure for information sharing across the Trust this year.

Pupil outcomes across the Trust, National initiatives and current thinking inform the Link Academy Improvement Plan which sets out the main focus areas for improvement for the year. These are supported with planned actions and these then form the basis for the individual academy improvement plans. The Academy Improvement Plans reflect the specific needs of each individual Academy. The impact of all improvement actions are evaluated for impact and outcomes are scrutinised and reviewed helping to ensure further decisions and actions are as effective as possible. The improved data system (Power Bi) is expected to support accurate review and evaluation and allow for more comprehensive and efficient access to reporting across the entire Trust.

The Quality Assurance aspect of this role requires the post holder to ensure Risks are being considered within every Academy. The Trust Risk Register is regularly discussed at every Audit committee meeting, it is subject to regular review through internal audit. Every academy has an active and detailed Risk Register that reflects those risks within that context for the Executive/ Academy Heads to oversee. Actions are regularly identified and there is an ongoing plan to continue to mitigate risk to the highest standard. The chair of the Audit committee must be diligent in their approach to the risks our Trust faces and ensure that actions are taken in a timely way corresponding to the identified level of risk.

## Quality Assurance & Data Plan 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
To fully develop the use of Power Bi which is a bespoke data reporting system linked with SIMs (MIS). All Trustees need to understand how to access and use the system to scrutinise outcomes for pupils and create a Core Headline Data across the Trust.	<p>The Academy Data &amp; Standards Lead (ADSL) will ensure that Power Bi operates successfully and is drawing the data from SIMS accurately. He will present the programme to Trustees in December</p> <p>Progress and Attainment data will be baselined in October when teachers have had the opportunity to assess where pupils are after Covid Lockdown 1. Data drops will then happen at the end of every term</p> <p>The ADSL will present an analysis after each data drop and Trustees will consider where their scrutiny should be placed</p> <p>The Academy Trust School Improvement Lead (ATSIL) will link the work of monitoring School Improvement with the data and present to Trustees in the Spring term, particularly updating on progress following Covid lockdown.</p> <p>Trustees will access Power Bi to monitor and scrutinise their specific areas of focus. Local Boards will also be able to access Power Bi to compare performance across schools/ Trust</p> <p>ADSL to meet regularly with QA &amp; D portfolio holder to develop extent of Power Bi application</p>	<p>ADSL will ensure Power Bi is available to specified stakeholders and the information is accurate</p> <p>QA&amp;D Portfolio holder will support to ensure Trustees requirement are being met</p> <p>E/AH to ensure data is entered at agreed drop points and is accurate</p> <p>CEO to link with reporting to Trustees E/AH to link with reporting to LBs</p>	<p>Power Bi properly set to link with SIMS- September.</p> <p>Data scrutiny Sept to ensure accuracy of each academy's data.</p> <p>Data Drop points- end of Autumn, Spring &amp; summer term.</p> <p>ADSL to present at Dec Trustee Board meeting</p>	<p>Power Bi will reflect accurate data that has been moderated for consistency for Trustees to access.</p> <p>Trustees will be regularly scrutinising the data to ensure all academies are operating effectively</p> <p>Regular discussion of data at Trustee meetings will ensure it supports reporting</p>	

Continue to develop the Data and Reporting Management Plan-ensuring that reporting is consistent	<div><p><u>LAT Data &amp; Reports Management Plan</u></p><div><div><p><b>SIMS</b></p><ul style="list-style-type: none"><li>1. Data Drop 1 – Head Teachers</li><li>2. Data Drop 2 – Head Teachers</li><li>3. Data Drop 3 – Head Teachers</li><li>4. Results – Government</li><li>5. Class Registers</li><li>6. Safeguarding Data</li><li>7. Behaviour Watch Data</li><li>8. Other data?</li></ul><p>Data Input &amp; Data Base Design SIMS reports and/or Export Data to Excel &amp; Design Spreadsheet</p></div><div><div><p><b>Attainment</b></p><ul style="list-style-type: none"><li>• Predictions</li><li>• Aspirations</li><li>• Actuals</li></ul></div><div><p><b>Attendance</b></p><ul style="list-style-type: none"><li>• Pupil</li><li>• Class</li><li>• School</li><li>• LAT</li></ul></div><div><p><b>Safeguarding</b></p><ul style="list-style-type: none"><li>• Use Current Reporting Form</li></ul></div><div><p><b>Pupil Numbers</b></p><ul style="list-style-type: none"><li>• PAN Figures</li></ul></div></div><div><p><b>Reports</b></p><ul style="list-style-type: none"><li>• Head Teachers</li><li>• CEO</li><li>• Administration</li><li>• Board</li></ul><p>Red flags? Content? Graphs &amp; Bar Charts? Frequency?</p></div></div><p>ADSL QA&amp;D PH CEO</p></div>	Following set up of Core Data facility	Improved consistency of Reporting to Directors in comparable formats		
Following Covid, look at Risk Management across the Trust, particularly local level risks and drive consistency in Academy level Risk management systems	<p>CEO and QA &amp;D PH</p> <p>Support the Risk Register for the Trust</p> <p>Consider Risk Management in academies and ensure a consistent reporting structure</p> <p>Involve Local Boards in regularly maintaining and updating these</p>	<p>CEO &amp; QA&amp;D PH</p> <p>Directors review</p> <p>Link with ADSL established</p> <p>Link with ASIL established</p>	<p>Meetings- half termly with CEO</p> <p>Ongoing-reporting to Directors at meetings as required.</p>	<p>Risk Management across the Trust is well managed and accurately updated on a regular basis.</p> <p>Each academy has a Risk Register that is accurate and regularly updated- LBs are involved</p>	
Quality Assure the work of the newly formed Executive Improvement Team (EIT)	<p>QA&amp;D PH to meet with EIT and review their approach.</p> <p>Consider the Priority Action Plan and progress throughout the year against this.</p> <p>QA &amp;D PH report to Trustees how challenge has been delivered and impact.</p>	<p>EIT</p>	<p>Agreed meeting schedule at least once a term</p>	<p>Trustees have assurance that the newly appointed EIT are effective in securing the best quality school improvement for all schools in a prioritised way.</p>	

## **Workforce Strategy, including Recruitment, CPD and Performance Management 2020-21**

**Portfolio Holder: Cheryl Mathieson**

### **Core principles:**

The Link Academy seeks to recruit, retain and develop staff at all levels. The expectation is that staff are, where appropriate, promoted from within and are deployed where they are most needed in order to have the greatest impact. Strategic staffing structures are maintained for each academy and across the whole organisation, in order to identify where prospective changes could be planned to best suit the needs of individual schools and staff career progression. Trustees consistently have access to these charts, they are reviewed annually as part of the Talent Management strategy by the Workforce Strategy Portfolio Holder, Chair of Trust, CEO and TBM. Succession planning across the MAT, as it continues to expand, is in place and continually reviewed.

The Trust HR Officer assembles a confidential personnel file for every individual staff member of the Trust at the point of recruitment and carries out all pre-employment checks. The file is then passed onto the academy administrator to maintain. Rigorous checks of all personnel files are carried out by the HR Officer twice yearly to ensure robust and accurate data is available at all times. The Single Central Register (SCR) is similarly overseen and checked by the HR Officer, backed up by Local Governor monitoring checks. A SCR for all central staff and governance is maintained by the HR Officer and shared with the academies regularly throughout the year.

The Link Academy provides high quality training and development opportunities which are fully planned in close association with priorities of the annual Trust Improvement Plan. Consideration of every individual's needs, strengths and areas requiring development ensures the CPD provided extends the ability of all staff to fulfil their roles and have maximum impact on pupil's learning and lives. A fully budgeted CPD strategy is developed annually to meet the needs of all staff across the Trust, which ensures all statutory training is completed in a timely way. There is a Trust CPD Model which illustrates a balanced approach to CPD training annually.

Coaching and mentoring opportunities are vital and highly effective in our peer to peer support initiatives and programmes.

Currently we offer in-depth training programmes for Teaching Assistants, Newly Qualified and Early Career teachers, alongside an intense support course for Leadership personnel in Specialist Curriculum areas. The Improvement and Inclusion Hub offers training all year round in intervention and pupil therapeutic support. It is expected that the Trust will continue to extend the opportunities for purposeful training year on year, however where internal provision is lacking it is sourced externally from highly respected providers.

The Link Academy also works with a number of local Teaching School Alliances, both sharing expertise and accessing experienced and effective support.

Staff wellbeing is of paramount importance to the Trust and we seek to consistently improve work/life balance for all personnel in order to retain our highly respected staff. Examples of support include a review of marking expectation, Give Back Day for every member of staff, wellbeing policies etc.

Recruitment was an area of focus in 2019-20. We improved the consistency of our recruitment procedures, especially the advertising of positions and application forms to ensure the required data was obtained prior to interview processes ensuring GDPR compliance. We also introduced diversity monitoring. Our offer to teachers/staff joining our schools will be provided to candidates, including career progression within the Trust. We will have a more uniform approach to interviewing- providing sample activities, formal questions, teaching expectations etc from which Academy Heads can select to get the best out of the interview situation. All processes will be reviewed and evaluated to maintain the highest quality process and evaluation will be ongoing as successful candidates will be asked to feedback.

Our websites will be updated to reflect the Trust offer to all staff and this will be an area for improvement in 2020-21.

We also plan to review the appraisal process for all staff and continue with the enhancement of our health and wellbeing provision across the Trust.



### Workforce Strategy, Recruitment, CPD and Performance Management Plan 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
<p>To continue to evaluate HR processes annually, including staffing structures, update changes, identify leadership &amp; succession planning.</p>	<p>Personnel data is now maintained to the highest standard, it is kept current and all documentation is retained in staff files- HR checks take place</p> <p>Training programmes have been identified and put into action for 2020-21. Trustees are aware of these.</p>	<p>Workforce Strategy Portfolio Holder (WS PH) will support &amp; challenge all HR procedures, policies and actions.</p> <p>WS PH reports to Trustees to ensure deeper understanding.</p> <p>CPD programme for the year is scrutinised and monitored by CEO &amp; WS PH- reporting to Directors.</p>	<p>September update &amp; ongoing records kept</p> <p>Ongoing work with HR Officer- CEO, WS PH</p> <p>September CPD offer scrutinised &amp; monitored termly</p>	<p>Leaders and expertise identified to provide individual career progression</p> <p>Personnel records are accurate &amp; securely held.</p>	
<p>Staffing Grids produced to inform Trustees</p>	<p>HR Officer produces updated Staff Grids for 2020-21. Trustees have access to these, and they are used to benchmark and inform future HR actions.</p>	<p>HR Officer to prepare the Charts &amp; keep updated- including personnel data &amp; documentation,</p>	<p>Talent planning starts April 21 for 2021-22 draft plan.</p>	<p>Trustees have a clear understanding of staffing structures across the Trust</p>	
<p>Talent planning for 2021-22 and look at Staff succession planning across the Trust</p>	<p>New staff joining the Trust are assessed and their potential explored- induction training is put in place to ensure quality CPD from the outset Induction Booklets available in every school</p>	<p>Scrutiny of staffing and planned use of internal talent starts April- to inform 2021-22 plan.</p>	<p>Ongoing</p>	<p>Staffing structures are planned with regard to expertise for 2021-22</p>	
<p>Ensure all Job Descriptions are accurate and set up a review programme</p>	<p>2020-21 plan is explored and collated in draft form for September '21 start</p>	<p>Workforce Group in conjunction with other senior leaders where appropriate</p>	<p>Policies per review dates</p> <p>Spring term</p>	<p>Job Descriptions are up to date</p>	

<p>To review reference procedures including update templates</p>	<p>Produce table of Job Descriptions with a review cycle (3yrs proposed) Job descriptions are updated where known to be out of date and a programme of review is in place to ensure regular checks and updates are made</p> <p>All personnel policies are updated and adhered to.</p> <p>Draft standard examples to ensure all AH's are consistent in their responses All references must go through AH's Reference requests templates are updated</p>	<p>Workforce Group in consultation with AH's</p>		<p>References will be more consistent across the Trust</p>	
<p>Ensure the appraisal process for all staff meets the Trust's expectations and that the process and expectations are easily understood by all staff (especially those from academies new to the Trust). Ensure that targets set are consistent across the Trust</p>	<p>Review appraisal documents to ensure appraisals continue to target relevant areas and follow best practice guidelines</p> <p>Review timetable to ensure that it is achievable</p> <p>Moderate targets being set to ensure consistency across the Trust and ensure coaching/training is provided for those not familiar with the Trust's expectations</p> <p>Develop examples of SMART targets for training/coaching purposes</p>	<p>CEO, WS PH and HR Officer to review documents</p> <p>CEO and WS PH to challenge targets set</p>	<p>Complete review of documents and timetable by June 2021</p> <p>Ongoing scrutiny of targets</p>	<p>All staff have consistent, measurable and achievable targets</p> <p>The process is carried out within the required timeframe An improved equitable scheme</p>	

<p>To look at and propose changes to 'Join the Link' page on Trust website</p> <p>Create a CPD Offer for Website page offered by the Link for staff employed by the Trust</p>	<p>CPD Offer will include:</p> <p>Information about:</p> <p>The Curriculum Leadership Groups (CLG) Terms of Reference (ToR), expectations in terms of meeting</p> <p>NQT programme and dates set up</p> <p>HLTA programme</p> <p>Teaching Assistant programme &amp; dates</p> <p>Early Career and prospective Academy Head programme links to Teaching Schools</p>	<p>All documentation completed- costings included within 2020-21 Budget</p> <p>Course leaders set</p> <p>Course leaders produce a programme to upload</p>	<p>Throughout year</p>	<p>The Link 'offer' for staff joining the Trust is made explicit on the website.</p> <p>All the CPD opportunities on offer within the Link Academy Trust will illustrate career progression in the Link and the website will be thoroughly upgraded</p> <p>The ITH Offer will be promoted as above</p>	
<p>Set out the Improvement &amp; Inclusion Hub (IIH) training offer including offers for pupils and families</p>	<p>IIH full programme of provision set out, including:</p> <p>Specific Training Packages, SEND Conferences &amp; supervision, Therapeutic Courses for challenging &amp; Vulnerable children.</p> <p>All courses costed and organised with agreed pricing structure</p>	<p>Becky Humphreys &amp; Jon Couch- MAST support.</p> <p>Nikki Racey- Therapeutic Pupil provision</p>	<p>Throughout Year</p>		
<p>Review and improve the provision for health &amp; wellbeing of staff across the Trust wherever possible, particularly as a result of the Covid 19 pandemic</p>	<p>Develop a Wellbeing Policy for Staff</p> <p>Mental Health Strategy</p> <p>Induction Booklet upgrades</p> <p>The website will carry information that illustrates wellbeing of staff is a priority</p> <p>Supervision programme set out</p>	<p>WSPH, CEO &amp; HR to work on all aspects and upload to website</p>	<p>Continued throughout the year</p>	<p>Policies for Staff Wellbeing and Mental Health will be in place. Other measures will be considered including: Mentoring &amp; support, supervision etc and all will be explored and set out on the website</p>	

## Communication and Information Technology 2020-21

**Portfolio Holder: Dominic Course**

### **Core principles:**

The Link Academy is fully aware of the heightened importance of IT to provide home learning as part of the overall Blended Learning programme required during this period of the Covid 19 pandemic. Every Academy has a Blended Learning plan in place as part of the Recovery programme and this is updated termly and monitored regularly by the Academy Trust School Improvement Lead (ATSIL) as well as the Executive Improvement Team (EIT). The Central Business Team and our IT partners Limbtec have an important role to play in facilitating delivery as a priority too. This has become a major urgency as a result of the pandemic for all Academies within the Trust, in terms of training staff and ensuring pupils can access this form of learning, as well as ensuring the hardware is working effectively for all, particularly disadvantaged pupils. The Government require us to have the facility to deliver Quality First Teaching online now so all Academies must act immediately and continue throughout the year to develop highly effective teaching strategies to ensure good attainment and progress for all pupils.

Communication to our stakeholders and particularly parents to support online learning continues to be further developed. Support for pupils to ensure their ongoing progress during the pandemic can only be achieved where clear routes of communication exist and are well understood, accessible and parents know how to link into workshops, meetings etc. Again, hardware is an issue which we are striving to improve with our partners Limbtec using the Government Catch-up grant. Plans are in place to continue to expand the hardware we have available in every academy.

MS Teams as a platform has been agreed as the basis across the Trust, using it to its full potential is a further priority. We will also be building varied practice and resources including the use of Oak Academy online lessons alongside pupils interacting their own teacher to drive learning as rapidly as that might be needed. 'Teacher voice in the home' is a requirement to ensure Quality First Teaching is fully delivered regardless of circumstances.

Online meetings are now a regular feature as a system of internal communication which ensures key messages and school improvement training are fully and rapidly shared across the Trust at all levels. Most importantly it enables School Improvement to continue effectively.

High quality Information Technology provision within schools is vital to supporting communication across the Trust and is audited annually with a follow up programme of identified / planned improvements delivered within the year, with longer term plans phased across 3-5 years. The Covid 19 pandemic has meant that this plan has a very high level of importance this year and has been prioritised across the Trust.

We believe using all forms of media to communicate externally not only the Trust's core vision but also the activities, successes and involvement in the community which reflect its values, thereby developing the positive reputation of the Link Academy Trust. We have a strong brand that is evident through our actions and we aim to consistently celebrate this ethos both within the organisation, but also locally, regionally and nationally.

Proactive and reactive systems of marketing, PR and media handling are in place, operating both internally and externally and they ensure all stakeholders are kept informed and feel part of the life of the Trust. These have been further enhanced as we have had to become more familiar with IT capabilities and the extent to which it can be employed.

A media crisis strategy is in place and senior leaders, Academy Heads, Trustees and Local Boards, together with other key stakeholders will have annual training on the protocols in the event of press enquiries following an emergency.

IT is of vital importance in ensuring every school has online information for prospective parents as well to maintain numbers on roll and schools operating at capacity.



### Communication and Information Technology Plan 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
To ensure all Academies are delivering Blended Learning and are immediately able to deliver online learning if there is a requirement	<p>Trust wide expectations set.</p> <p>Blended Learning plan to ensure the Bounce Back curriculum is delivered effectively put in place by every Academy.</p> <p>Staff must be trained and supported to be able to use technology to deliver online lessons which are QFT and puts teacher voice in the home- using MS Teams and any additional platforms. Short training videos available for E/AH to use with staff- and continue to practice</p> <p>Pupils must be taught how to access online learning and return their learning effectively. They must also be taught to adopt positive learning styles including resilience and independence.</p>	<p>EIT update half termly expectations Blended Learning plans monitored by SC</p> <p>E/AH to ensure continual training- all staff develop required IT skills Instructional clips on Teams for staff access E/AH &amp; IT Curriculum Group</p> <p>Teachers: Delivery of pupil sessions to ensure they can use MS Teams to access, complete and post their work</p>	<p>September updated half termly As above</p> <p>Staff meetings (weekly) drip, drip approach</p> <p>Ongoing- with specific support to ensure all achieve</p>	<p>All staff have practiced online lessons so that both they and the pupils are able to operate QFT effectively online</p> <p>A range of online resources are being used to support QFT online</p>	
To develop the quality and quantity of hardware that will ensure good online learning delivery initially in terms of school-based hardware, but also pupil access from home.	<p>Audit all devices available with Limbtec support and register for the future</p> <p>Review classroom provision to ensure all teaching spaces, including break out rooms now have smartboards.</p> <p>Purchase laptops to replace any teacher's laptop that is older than 2 years, including all part-time staff. Configure and distribute</p>	<p>C &amp; IT PH to be supportive in all actions MM &amp; Limbtec with co-operation from all E/AH to audit Smartboards ordered MM &amp; fitted by contractors providing £15K</p> <p>Number needed and order in place Configured to be distributed in Jan latest MM &amp; Limbtec £400 x 61</p>	<p>September- Oct</p> <p>Ordered Sept and Fitted Nov</p> <p>September delivery by end of November. In schools by Jan latest</p>	<p>All IT Hardware will be audited and reviewed, and a plan put in place to equip all schools using Covid Catch up grant and budget.</p> <p>Every school will have smartboards and all teachers' laptops will be upgraded, including part-time teachers.</p> <p>Pupil provision will be considered</p>	

	<p>Pupil provision audited Plan in place to improve pupil provision and seek solutions to poor access to the internet etc</p> <p>Other devices that support QFT identified, i.e. i-pads, cameras etc to delivery best teaching ad pupil's learning to access great learning</p> <p>Software in place to ensure QFT Budget's planned to ensure every school receives the hardware required to deliver the highest quality on-line learning particularly where pupils maybe required to work from home.</p>	<p>Family audit plan provision by school. Look into internet access. IT Curriculum Lead group Spring order when it is decided need for each school. E/AH &amp; MM &amp; Limbtec- £12K</p> <p>Software audit and plan Budget agreed including new Funding and any income generation need. MM, Income Generation Lead/ PTFAs</p>	<p>September-October-</p> <p>Jan- March</p>		
<p>To use IT to ensure good communication both internally to the Trust but also externally to promote all Academy's provision to ensure each setting is operating as near capacity as possible.</p>	<p>Internal Communication including online meetings, provision of paperwork including improved storage and access for appropriate stakeholders.</p> <p>External : Continued Facebook exposure Open Day Videos for each Academy Support for Income Generation actions Links with local newsletters etc Advertising into Estate Agents etc</p> <p>Possible re-design of logos and ensure new signage at schools that require it</p>	<p>E/AH, Governors and Trustees- learning curve! MM support</p> <p>E/AH continue to post regularly on Facebook</p> <p>Cost per school</p>	<p>Ongoing throughout the year</p> <p>Ongoing</p> <p>Open Day videos in place by October</p> <p>Spring term</p>	<p>IT will continue to be employed to its full potential in enhancing the reputation of the Trust as well as ensuring effective communication between all stakeholders within the Trust.</p>	

## Diocesan Liaison 2020-21

**Portfolio Holder: Fiona Walters**

### **Core Principles:**

As a Trust of mixed schools, Community, Voluntary Controlled (VC) and Voluntary Aided (VA) we operate a Governance Model structure where the ratio of Foundation governors to Non Foundation is 7:5. We feel there is a need within this to appoint a dedicated Trustee to ensure the Christian Distinctiveness of our Church Schools is thoroughly upheld and is a strength of the Trust.

The Diocesan Portfolio Holder (DPH) will support all Church schools within the Link Academy Trust and take feedback from the Ethos Committees to ensure the Trust Board are fully informed of any needs and achievements. The DPH will also work with the Christian Distinctiveness Lead, school improvement post holder to have a good understanding of the priorities being developed throughout the year as the teaching of religious education across the Trust in all schools will be an area of focus for the DPH.

The DPH will be expected to liaise with the CEO and Academy Trust School Improvement Lead (ATSIL), Executive Improvement Team (EIT) and Senior Leaders within the Diocese to ensure the Link Academy Trust delivers clear Christian Vision and Values linked with a deep understanding of the Bible teachings and Festivals of the Church year.

The DPH will support and challenge Academy Heads, to understand the SIAMS inspection process in order to ensure Church Schools deliver the very highest outcomes.

The DPH will meet with Diocesan representatives as required and report back to the Board of Trustees.





### Diocesan Liaison Plan 2020-21

Objective	Actions	Who? Cost? Detail	Date	Success Criteria	RAG – Commentary of progress towards objective
To continue to develop a strong relationship with the Diocese in order to work with Church schools either in association or as part of the MAT and particularly with the new Education Lead- Sue Lockwood.	<p>Attend Diocesan Leadership meetings &amp; relevant training</p> <p>Meet regularly with Diocesan Education Lead. (CDSIL)</p> <p>Maintain close monitoring arrangements in order to ensure Board of Trustees can monitor good practice and improved position</p>	ATSIL & CDSIL to agree Action Plan- portfolio holder to be involved PH with all aspects of RE / SIAMS throughout the year	<p>Throughout the year</p> <p>Continued meetings once a term</p> <p>Termly meetings to keep Trustees informed.</p>	Our Christian Distinctiveness School Improvement Lead will be working across all Link Church schools to ensure the highest quality practice which is available to all schools both within the Trust and externally by the end of the year	



To ensure all Church schools maintain the highest level of Christian Distinctiveness and ensure their Ethos is delivered in all they do, where appropriate in preparation for SIAMS Inspections	Consider 'Audit' Church Schools and work with them on what they need to develop to improve practice SIAMS support agreed for those school with the CDSIL in anticipation of an Inspection after January & review of those already inspected to ensure improvement continues	CDSIL and Church Executive/ Academy Heads  No cost	Throughout the year, particularly from January 2021 when Inspections are expected to resume.	Continue...through the RE Curriculum Leadership Group and involvement of CDSIL all Church schools will have embedded understanding & practices link with the Christian Distinctiveness of their particular school and this can be voiced by all stakeholders	
Through the RE Curriculum Leadership Group ensure all schools are working from the new RE Syllabus document- ensuring that it delivers full coverage in preparation for resumed Inspections in Jan 2021	RE Curriculum Group collaborates effectively- dates in place	Costed as part of CPD 2020-21 programme	RE Curriculum Leadership Group dates agreed- one per term	All schools will be confidently delivering the highest quality RE teaching in line with National Curriculum expectations	
	CDSIL to support and visit all schools – keep Diocesan Trustee informed	CDSIL- travel costs- £200	Meetings prioritised according to need- see audit outcome		
Review continued impact of CDSIL- particularly in new joining schools- Raleigh and Ilsington	Seek understanding of CDSIL Impact	Stakeholders consulted CDSIL appraisal	CEO/ ATSIL to work closely with CDSIL throughout year.	As part of Staff appraisal and review procedures gain further understanding of the impact of CDSIL	