

South Tyneside Academy Trust

Sponsored by South Tyneside College

# Our Vision



SOUTH TYNESIDE  
ACADEMY TRUST

## Contents

---

### **3. Section 1**

Introduction

### **25. Annex A**

Our Academies

### **29. Annex B**

Our Proposed New Academies

### **48. Annex C**

Financial Summary of Academy Trust

### **49. Annex D**

Growth Plan

## SECTION 1: INTRODUCTION

South Tyneside Academy Trust is a Multi Academy Trust, sponsored by a large general Further Education college with a world-wide reputation in maritime education.

Our aim is to support schools in South Tyneside and the wider region who have joined together because they share a collective vision for excellence in education at all ages. We believe children and other young people within our communities deserve outstanding academic and vocational opportunities and experiences from the moment they begin their educational journey to becoming successful people, able to lead happy, fulfilling and productive lives. We believe in building on solid foundations to provide an excellent education. Our students come from a wide range of social and economic backgrounds, and we are committed to helping them to achieve their maximum potential, whatever their starting point.

South Tyneside College, the Academy Trust sponsor, has a high degree of competitive advantage and a significant worldwide reputation based on the following key factors:

- Good financial management, significant capital redevelopment and zero borrowing;
- A modern, rationalised and revitalised campus, with world-class maritime and engineering facilities;
- Good and improving quality and student outcomes – Ofsted rated ‘Good’ (December 2015, new short inspection regime);
- ‘Outstanding’ Halls of Residence – Ofsted, November 2015;
- ‘Meets all expectations’ - QAA HE Review (February 2014);
- Well-established, highly experienced senior management, with excellent business and professional expertise;
- One of the highest percentage non-funding body income in the country (51% in 2014/2015);
- Very good employer relationships, worldwide, nationally and regionally;
- Significant specialisms supporting regional and national priorities;
- Outstanding KPMG/Tribal 2015 benchmarking against best performing Further Education colleges;
- Strong relationships with employers regionally, nationally and internationally, and active membership of key employer bodies including IAMI, SEMTA, EEF, Chamber of Commerce, Advanced Manufacturing Forum, Maritime Skills Alliance, and Merchant Navy Training Board;
- Good staff morale and employee relations despite significant workforce restructuring and contract renegotiation; good staff survey results, good relationship with trade unions, low staff sickness and low staff turnover levels, and Health and Wellbeing at Work Gold Award;
- Successful introduction of 14-19 Career College North East, specialising in engineering, advanced manufacturing and computer science.

We know that the route to future success lies in maintaining the highest of aspirations for our learners and ensuring that, by the time they complete their studies, they are well-equipped to move onto the next phase in their education and future lives.

# OUR VISION, MISSION AND VALUES

## VISION

To be an outstanding Multi Academy Trust (MAT), providing world-class education and training.

## MISSION

To provide the highest quality education and training, preparing young people for the future.

## VALUES

As an employer and a learning organisation, we will:

- Aim to be excellent in all that we do;
- Celebrate diversity and the rights of others;
- Act with integrity - fairly, openly and transparently;
- Be welcoming and approachable to all.

---

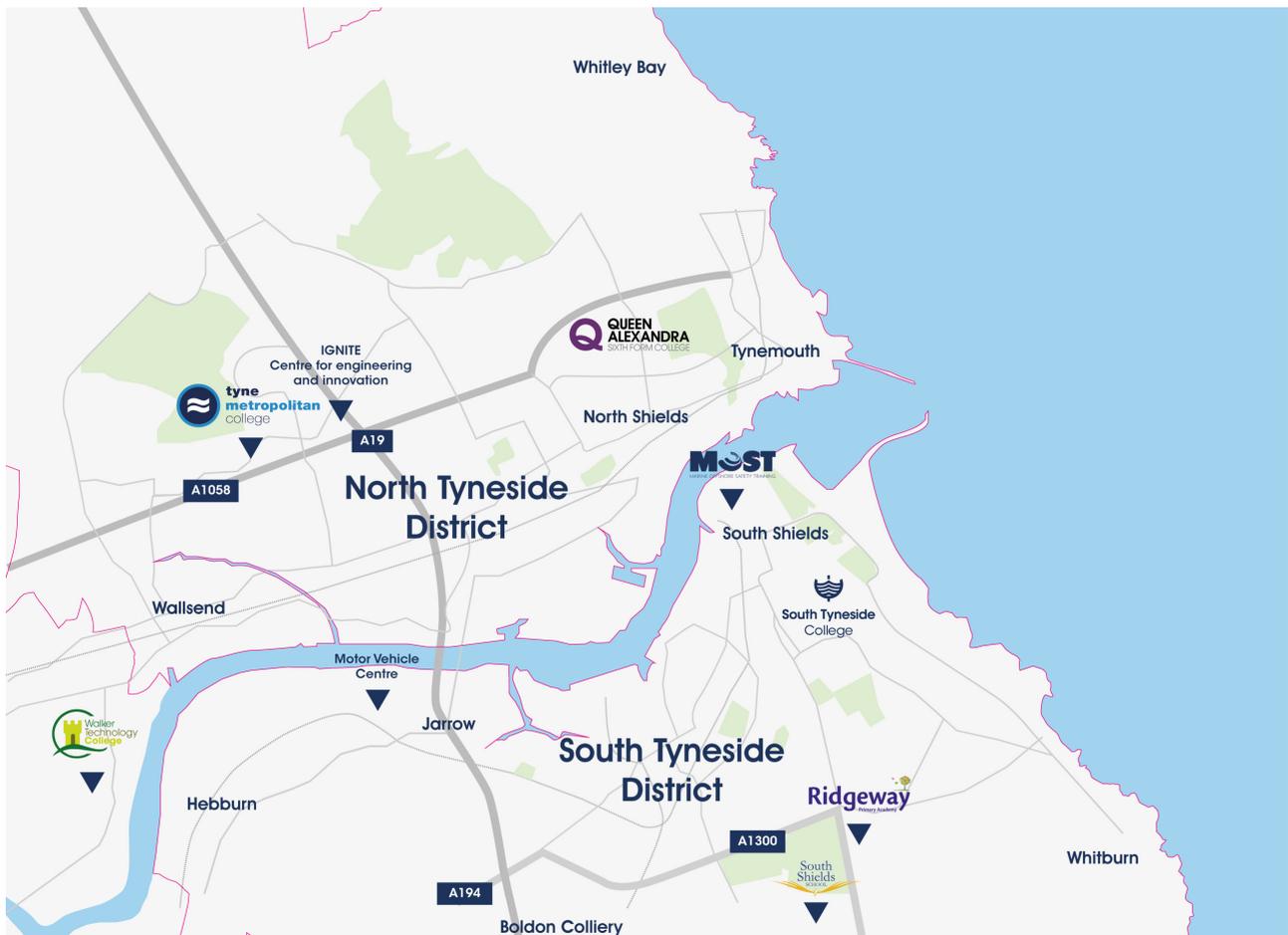
## STRATEGIC AIMS

- Provide high-quality teaching and learning.
- Create a high-quality learning environment.
- Be financially sound, able to modernise and grow, providing outstanding value for money.
- Provide a curriculum that meets the needs of all stakeholders in an ever-changing world.
- Work in partnership with the communities we serve, agencies and employers.

## CORE VALUES

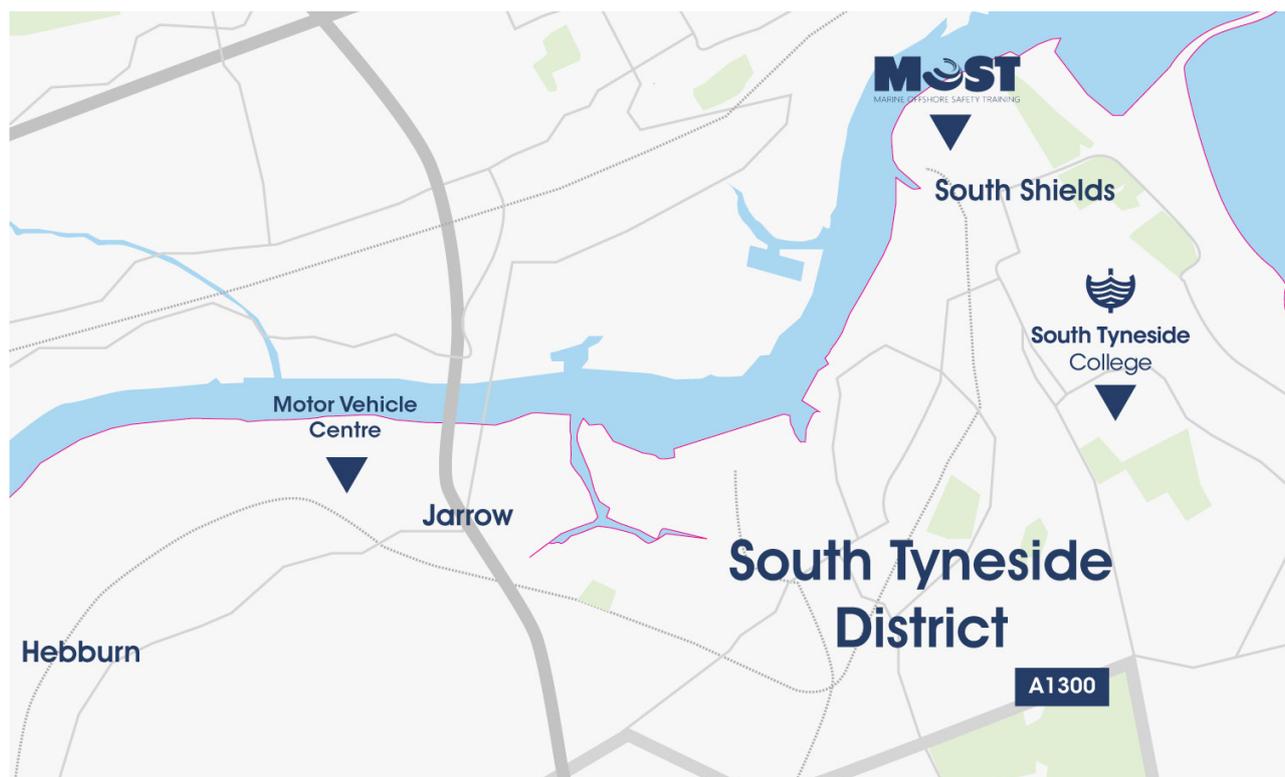
- We believe in being a strong community presence, embedding everything we do in the local community.
- We believe every pupil should achieve their potential.
- We believe in developing strong relationships with all of our pupils, and never giving up on them.
- We value and respect the professionalism, commitment, and excellence of our staff.
- We believe the needs of employers should shape our curriculum.
- We will make a significant positive impact on the local, regional and national economy.
- We welcome and include everyone in our community, and value individuality and diversity.

## OUR GEOGRAPHY



South Tyneside Academy Trust is based in the North East of England and our vision is to expand our school communities across Newcastle, North Tyneside and South Tyneside.

## SOUTH TYNESIDE



South Tyneside College operates successfully in one of England's most socially deprived areas, attracting students from many and varied backgrounds. Of funded learners, 5% come from ethnic minorities, with the largest cohort - 71-27.3% of BME total - being Bangladeshi, and 29 - 11.2% of BME total, being Arab. Across the whole organisation, 25.5% of enrolments come from a minority ethnic background, with the largest groups being Indian (1,773 - 41.5% of BME total), African (1,059 - 24.8% of BME total), and Arab (525 - 12.3% of BME total).

Of the 16-18 year-old learners joining full-time Level 3 programmes, 57.2% had attained mathematics and English at C or above, 16.3% did not have a grade C or above in either subject, 72.1% had English at C or above, and 68.8% had mathematics at C or above.

Statistics in 2015 showed that 8.3% of adults in South Tyneside have no qualifications. This is lower than the North East figure, which is 10.4%, and marginally lower than the UK figure of 8.6%.

The borough has 93,700 people of working age - 63% of residents - and around 72,000 of these are classed as economically active, according to the Office for National Statistics (ONS).

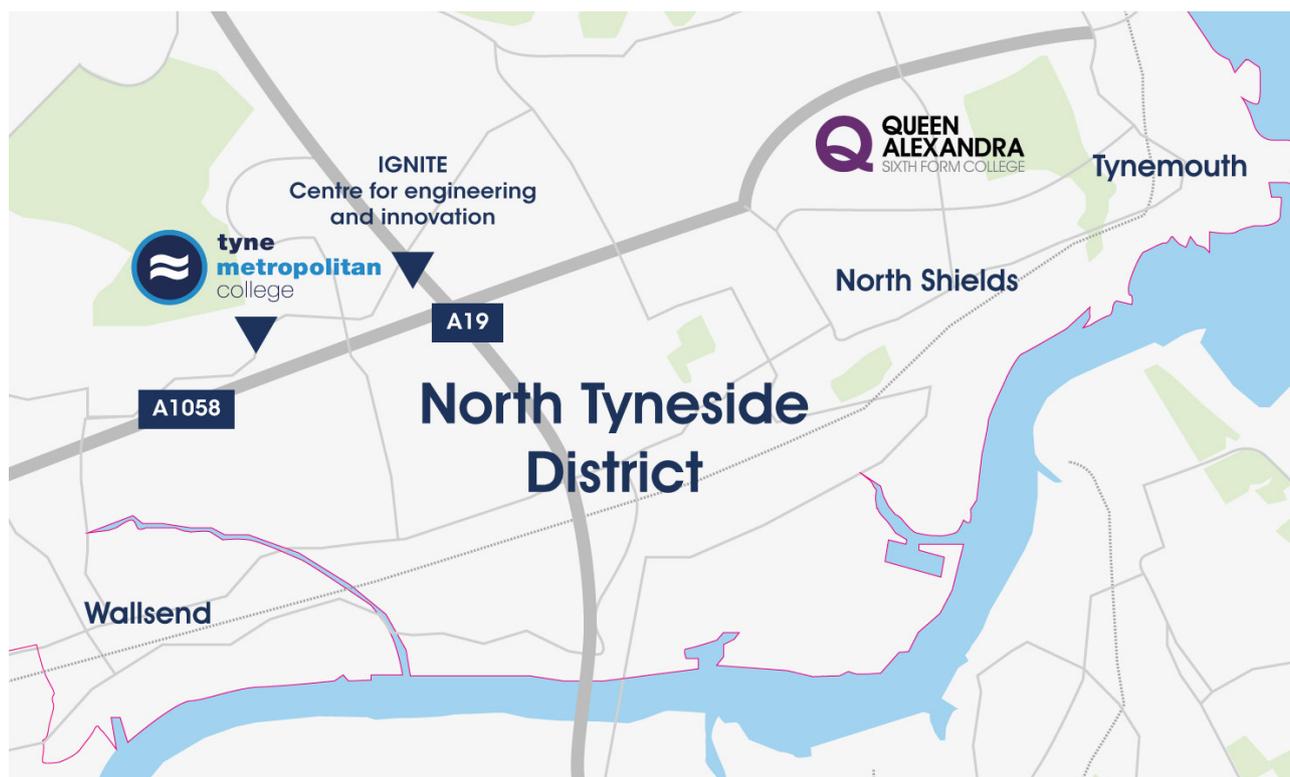
Around 66,000 people are in employment, with over 59,000 classed as employees and 5,700 self-employed. Around 6,700 people, or 9.3% of the population, are unemployed, higher than the regional average of 7.7% and the national rate of 5.1%.

ONS figures for the year to June 2016 show 10,700 people, or 16.2% of the working age population, work in professional occupations - below the 20% recorded nationally - and 9,300 people, or 14.1%, are associate professional and technical, the second largest grouping. Other significant occupational groups are skilled trades, administrative and secretarial, caring, leisure and other service occupations, as well as sales and customer service.

The latest data (2011/2013) shows that the healthy life expectancy for both males (60.9 years) and females (58.9 years) was below Provider Group Averages (63.3 years for males, 63.9 years for females)

In 2016, average weekly earnings for full-time workers stood at around £469 - £514 for males, and £421 for females - against an average national wage of £541, or £581 for males, and £481 for women.

## NORTH TYNESIDE



North Tyneside is ranked as 138 out of 326 for the key borough level deprivation measure (average Lower Super Output Area score). The recruitment area of the college includes local authority wards that have some of the highest levels of deprivation in the country. The college's immediate catchment area has a mixed profile. Seven percent of North Tyneside's population (approximately 13,300 people) now live in areas which are within England's 10% most deprived. By contrast, towards the coast are some of the more affluent Tyneside areas.

North Tyneside has a small BME population at 4.9%, of which 3.7% are from non-white origins, with a further 1.2% from white minority backgrounds. The largest group is the Asian and Asian British group and the largest minority faith is Islam. Most minority faith and BME groups are projected to grow over the next fifteen years. An estimated 1% of the population of North Tyneside are Trans, an estimated 1.1% gay or lesbian and 0.5% bisexual. Forty-seven percent of the population of North Tyneside are married, 0.2% are in a civil partnership, 32% are single, 10% divorced, 3% separated and 8% widowed.

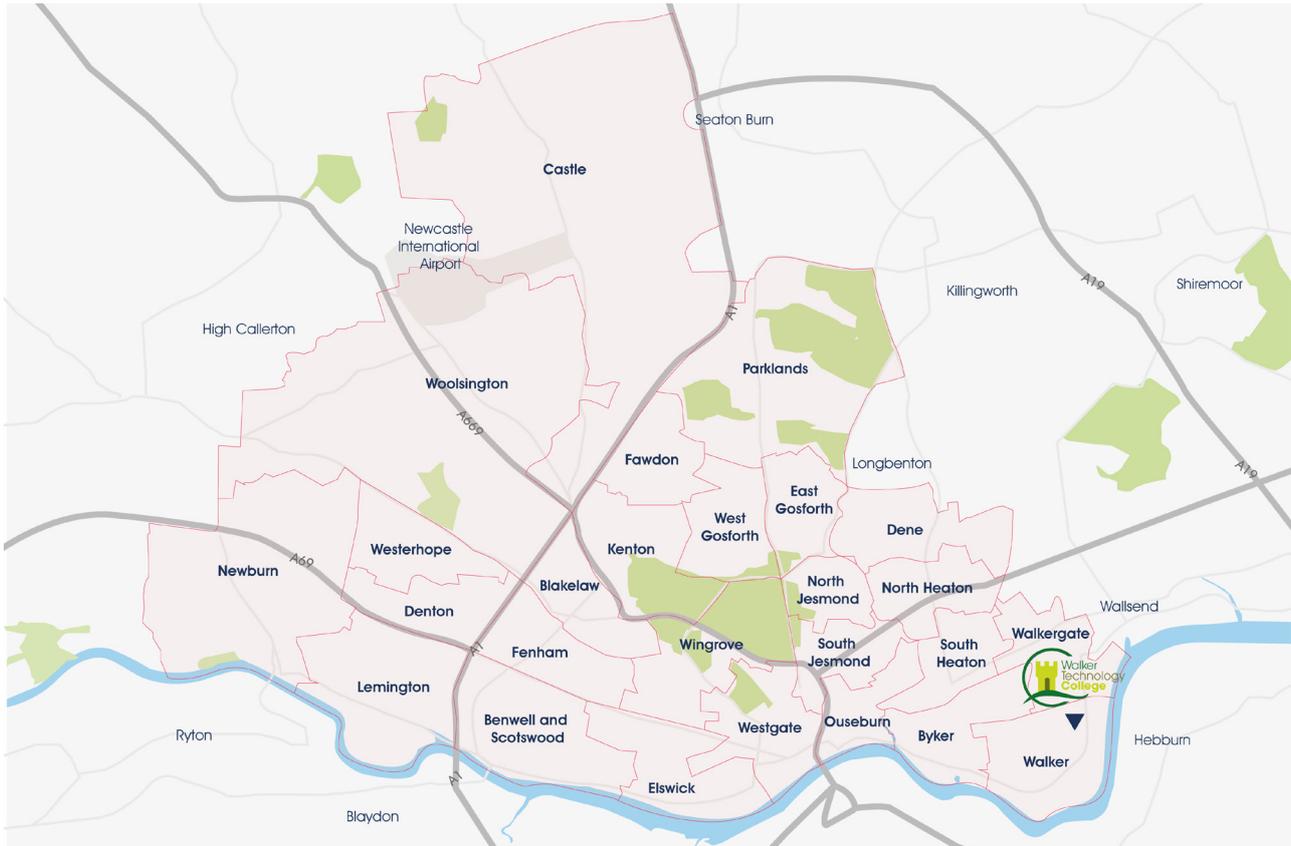
The proportion of school leavers attaining five or more GCSEs at A\* to C, including English and mathematics, in North Tyneside is slightly above the national average.

Within the borough, the latest published estimate on 16-18 learners who are Not in Education, Employment or Training (NEET) is 6.2%, which is the lowest of the four neighbouring local authorities - Northumberland at 6.7%, South Tyneside at 7.5%, and Newcastle at 11.8%. North Tyneside also compares favourably against both the North East average of 8.8% and the latest all England NEET rate of 8.1%.

The borough has a higher proportion of the working population qualified at NVQ Levels 1-3 than the North East and the England average. At Level 4, the borough is 1.1 percentage points behind the national rate. In the key attainment measure at Level 3, 53.7% of the resident population are qualified to Level 3, which is significantly higher than the North East average of 48.8% and slightly above the national average for England at 52.7%.

Twenty-one percent of the population of the borough have a declared disability, sensory loss or other long-term health condition. The disabled population is expected to grow slightly in line with an ageing population. Life expectancy for both men and women is lower than the England average - 11.5 years lower for men, and 9.1 years lower for women in the most deprived areas of North Tyneside than in the least deprived areas (based on the Slope Index of Inequality).

# NEWCASTLE



Newcastle's population in 2011 stood at 280,000, up from 266,000 a decade earlier, according to the Office of National Statistics. There are approximately 56,263 children and young people aged under 18, or 19.4% of the population. Of these, 41,942 are aged 5-18, and 36,338 attend state funded schools. Newcastle has around 13,775 children living in low income households.

In January 2015, children and young people from minority ethnic groups accounted for 30.9% of children in state-funded primary schools, compared with 10.6% in the North East and 30.4% in England. In secondary schools, the figure was 23% compared with 8.2% in the North East and 26.6% in England. The largest minority ethnic groups of children and young people in the area are Pakistani and Bangladeshi.

The local child poverty measure for Newcastle, defined as the proportion of children living in families in receipt of out of work benefits or in receipt of tax credits where their income is less than 60% of median income, is around 27%. Children of lone parents, disabled children and those from certain, but not all, BME (Black and minority ethnic) backgrounds are at greater risk of living in poverty.

In 2015, 55.7% of children, compared to 57.1% nationally, left school with five or more GCSEs or equivalent at grades A\*-C including English and maths, a drop on the previous two years but 3.1% higher than in 2011. Academic achievement among young people living in deprived areas was lower than the average for Newcastle.

By 2020 there are likely to be around 1,800, or 9% more primary age children, and 1,600, or 13%, more secondary age children. In 2014, the percentage of Year 11 leavers remaining in some form of learning was 95.72% and for 2015 the figure was 96.2%. Academic achievement among young people living in deprived areas is lower than the average for Newcastle.

The number of people aged 65-74 will grow by a third between 2008 and 2028, with the over 85 age group increasing more significantly, from a total population of 5,700 people in 2009 to an expected 9,000 people in 2029, a 58% increase.

Newcastle has 27,870 people, or 15.6% of the working age population, who are unemployed and claiming benefits. Around half of those claiming out of work benefit in Newcastle claim Incapacity Benefit. Proportionally fewer BME in Newcastle are in employment compared with white people.

Average incomes also vary significantly within the city and the average wage of Newcastle residents is lower than the national average. According to the Index of Multiple Deprivation 2010, Newcastle is ranked 40th most deprived local authority, and 72,000 people in Newcastle live in the most deprived areas of the UK.

Newcastle has experienced increases in life expectancy in recent years but it has improved more slowly than England. Life expectancy at birth in Newcastle for men is 77.9 years, and for women 81.9 years.

## OUR SPONSOR - SOUTH TYNESIDE COLLEGE

South Tyneside College, which developed from the creation of the original South Shields Marine School in 1861, is today recognised nationally as a high-quality, financially strong and employer-facing institution, with the modern day marine school one of the world's top maritime colleges. Significant numbers of learners travel to the college from other UK regions (funded) and internationally (fee paying), due to the marine school's reputation for delivering world-class maritime education.

The college serves the South Tyneside community and Tyne and Wear employers, and delivers the largest proportion of engineering provision in the North East. The college also delivers a significant proportion of Level 3 and 4+ qualifications, with the majority in STEM subjects. A dedication to educational advancement and career attainment makes South Tyneside College an exceptional centre of learning. By forging strong links with business and other organisations across the region, it provides a learning experience for students overflowing with opportunity.



### **This is done through:**

- Apprenticeships and traineeships – a growing range is meeting student and employer demand;
- Degree and Foundation Degrees, Higher National Certificates and Diplomas, Professional Diplomas, and BTECs;
- Career College North East (CCNE) – a specialist two-year study programme in advanced manufacturing, engineering and computer science for pupils aged 14-19;
- Specialist partnerships, such as with Lee Stafford Education, an advanced hairdressing initiative to improve student and lecturer skills.

These important routes to learning mean it is supporting students into work within sectors where jobs exist or are being created, and helping businesses power the regional economy, reducing skills gaps and supporting emerging markets.

### **Beyond the college, impact is also significant:**

- Created South Tyneside Academy Trust through which it sponsors Ridgeway Primary Academy, a school which was statistically the worst performing in South Tyneside for 20 years but is now highly rated, with progress in the top 1% nationally and the highest percentage of higher achieving children in the local authority;
- Partnered with Monkwearmouth Academy to create Monkwearmouth Sixth Form College in a neighbouring education authority, supporting a direct need from school leavers for FE close to home;
- Supported a new £12m health centre within South Tyneside District Hospital, through students operating its hair salon, café and shop;
- Created a specialist engineering team to work with employers to identify operational shortfalls and find solutions.

It has also developed short community and professional courses that link it closely to the community by helping people learn skills, gain qualifications or a hobby. The Access Programme to Further Education helps adults without the right qualifications progress to university.

More widely, the world-famous South Shields Marine School – and its Marine and Offshore Safety Training Centre (MOST) – are significant drivers to economic prosperity. The marine school attracts thousands of students from across the globe each year, while MOST provides essential offshore training.

This diversity means it has 11,000 full and part-time students, each assigned a Personal Learning Coach to help their progress. To meet this numbers challenge, and maintain professional progress, staff are supported through individual performance reviews, teaching and learning observations for personal professional development, and development days.

After completing their course, 92% of students move into employment or further study, with 86% of those who move into employment working in a course-related job. The pass rate on intermediate level delivery is 77.8% against a national average of 68.4%. In advanced delivery, it is 92%, against 69.1% nationally.

In February 2017, South Tyneside College was awarded FE College of the year and Overall FE provider of the year at the prestigious TES Awards 2017.

## OUR SPONSOR'S PROPOSALS FOR MERGER

On August 1, 2017, South Tyneside College will merge with Tyne Metropolitan College to form Tyne Coast College. Tyne Coast College's vision is to be a world-class educational facility, focused on developing the potential of the employees of the future, thereby ensuring the long-term prosperity of the region.

The mission of Tyne Coast College is to provide outstanding educational opportunities for the benefit of the students and the communities it serves. This is an exciting opportunity for a new Further Education college, operating from sites north and south of the river Tyne, with joint facilities that will strengthen and enhance the constituencies of North Tyneside and South Tyneside, and the surrounding areas. This new model will result in a stronger, higher quality and financially resilient college, that can deliver skills for learners locally, regionally, nationally and internationally.

Tyne Coast College will:

- Be financially outstanding and highly resilient through economies of scale, enhanced financial expertise and outstanding business effectiveness and efficiency. This financial strength will enable the college to grow and develop a range of new curricula for future generations;
- Develop curriculum innovation and specialisation, enhance capacity for investment to align provision to the devolution and sub-regional skills and economic agenda;
- Draw on the existing strengths and employer base of Tyne Metropolitan College (TyneMet) and South Tyneside College (e.g. advanced manufacturing and engineering), which will positively impact on the larger new institution, as working together will give greater impact on the region and will provide regional STEM leadership;
- The new college will focus on the future needs of students, employers and the communities of North Tyneside and South Tyneside by building on the existing breadth of activity of TyneMet and South Tyneside College (e.g. commercial activity, international work, Higher Education, Job Centre Plus delivery, Career College North East, North East Sports Academy) to grow student recruitment and support enrichment;
- Develop a single apprenticeship brand based upon existing strong track records at TyneMet and South Tyneside College, building a strong and unique offer for employers;
- Strengthen maritime programmes – extend the renowned range of maritime programmes to meet the future workforce needs of this specialist industry;
- Strengthen the Queen Alexandra Sixth Form College – extend the specialist A Level opportunities to more students north and south of the river Tyne with a pre-university experience at a sixth form college;
- Extend the capacity for development of its key asset (staff) by sharing best practice, improving career opportunities and talent development and becoming an employer that attracts and retains the best talent;
- Continue to develop the Multi Academy Trust model to support school academisation, providing a highly trusted, high-quality regionally based sponsor;
- Significantly improve the learning opportunities, experience and environment for every student, enabling them to be first choice for employers and universities.

## SOUTH TYNESIDE ACADEMY TRUST TEAM

### Executive Staff Roles

---

#### Chief Executive Officer

The Department for Education regulations require that every Multi Academy Trust appoints an Executive Officer who will also act as the Academy Trust's Accounting Officer. The role of accounting officer includes specific responsibilities for financial matters. It also includes a personal responsibility to Parliament and to the Education Funding Agency's accounting officer, for the financial resources under the trust's control and compliance with all regulatory requirements.

---

#### Dr Lindsey Whiterod OBE



Dr Lindsey Whiterod OBE is the Chief Executive of South Tyneside College and CEO of the Academy Trust. Lindsey has overseen a rapid rise in education standards at South Tyneside College since introducing a new focus on vocational qualifications after becoming Chief Executive in October 2009. Her resolute and forward-thinking approach to provision has ensured courses and resulting qualifications target real jobs - a policy that has won the approval of many within the North East business community and education inspectorate Ofsted, which graded the college 'Good' in 2015 and Ridgeway Primary Academy 'Good' in 2016. Her influence on the college's academic resurgence is such that she was made an OBE for services to education in the New Year's Honours List in 2013.

Lindsey, a solicitor who began her education career as a law lecturer at South Tyneside College in 1994, has worked in Further Education at senior management level since 2000 when she became Director of the School of Business, Management and Computing at Newcastle College. Three years later she joined New College Durham as Deputy Principal, before returning to South Tyneside College. Her titles of Principal and Chief Executive were combined into that of Chief Executive in 2014. Her achievements include overseeing capital refurbishment and estate rationalisation programmes in excess of £14m, part of which has been a £4.5m upgrade to the college's world-famous South Shields Marine School and the development of its world-renowned brand into new markets in countries such as China, India and Bangladesh.

## Chief Finance Officer

The Department for Education stipulates that a Chief Finance Officer (CFO) must be appointed by the Board of Trustees of a Multi Academy Trust. The CFO plays both a technical and range of support and leadership roles, including ensuring sound and appropriate financial governance and risk management arrangements are in place, preparing and monitoring of budgets, and ensuring the delivery of annual accounts.

The CFO for South Tyneside Academy Trust undertakes a significant financial budgeting, analysis, planning and risk management role. In addition, the CFO focuses on key strategic management and business continuity and development functions. The CFO reports to the Board of Trustees and supports and advises the Accounting Officer/CEO. In addition, the CFO is required to provide information and support to the Board of Trustee Finance and Audit Committee.

---

### Helen Beaton



A qualified accountant, Helen Beaton has been the Chief Financial Officer for the Academy Trust since its inception, as well as Deputy Chief Executive of South Tyneside College. She assisted in the establishment of the Academy Trust and developed its financial operations; she plays a full part in the management of the Academy Trust. Helen, who is from Huddersfield, remained in the North East after gaining her accountancy degree at Newcastle University in 1987. In 2001 Helen joined the Learning Skills Council with responsibility for the financial aspects of capital projects and to provide financial advice and support to 22 colleges across the region.

Her first post was with Ernst and Young in Newcastle, where she qualified as a chartered accountant. She went on to work at Northumberland Training and Enterprise Council in 1992, where she became Financial Controller. Helen came to South Tyneside College as Vice Principal for Finance and Resource in 2008, and became Deputy Chief Executive in 2013.

---

## Clerk to the Trust

### Neil Longstaff



Neil Longstaff is the Director of Governance at South Tyneside College, which incorporates the roles of Clerk to the College Board, Company Secretary to the Academy Trust sponsored by the college, and Clerk to the Academy Board of Directors. The roles are pivotal in ensuring high-quality governance of the college and the Academy Trust in providing professional, pro-active information, advice and support to the Chair(s), Chief Executive and all the members of the College Corporation and Academy Trust, enabling them to fully carry out their roles and responsibilities. The duties also include ensuring compliance with statutory and regulatory requirements and that decisions of the Board(s) are implemented.

Neil joined South Tyneside College in 2014 from South Tyneside Council, where he had the role of Governor Support and School Admissions Manager which included managing the local authority's clerking service to schools and academies. He is a Chartered Secretary and has been working in the field of school governance for 25 years.

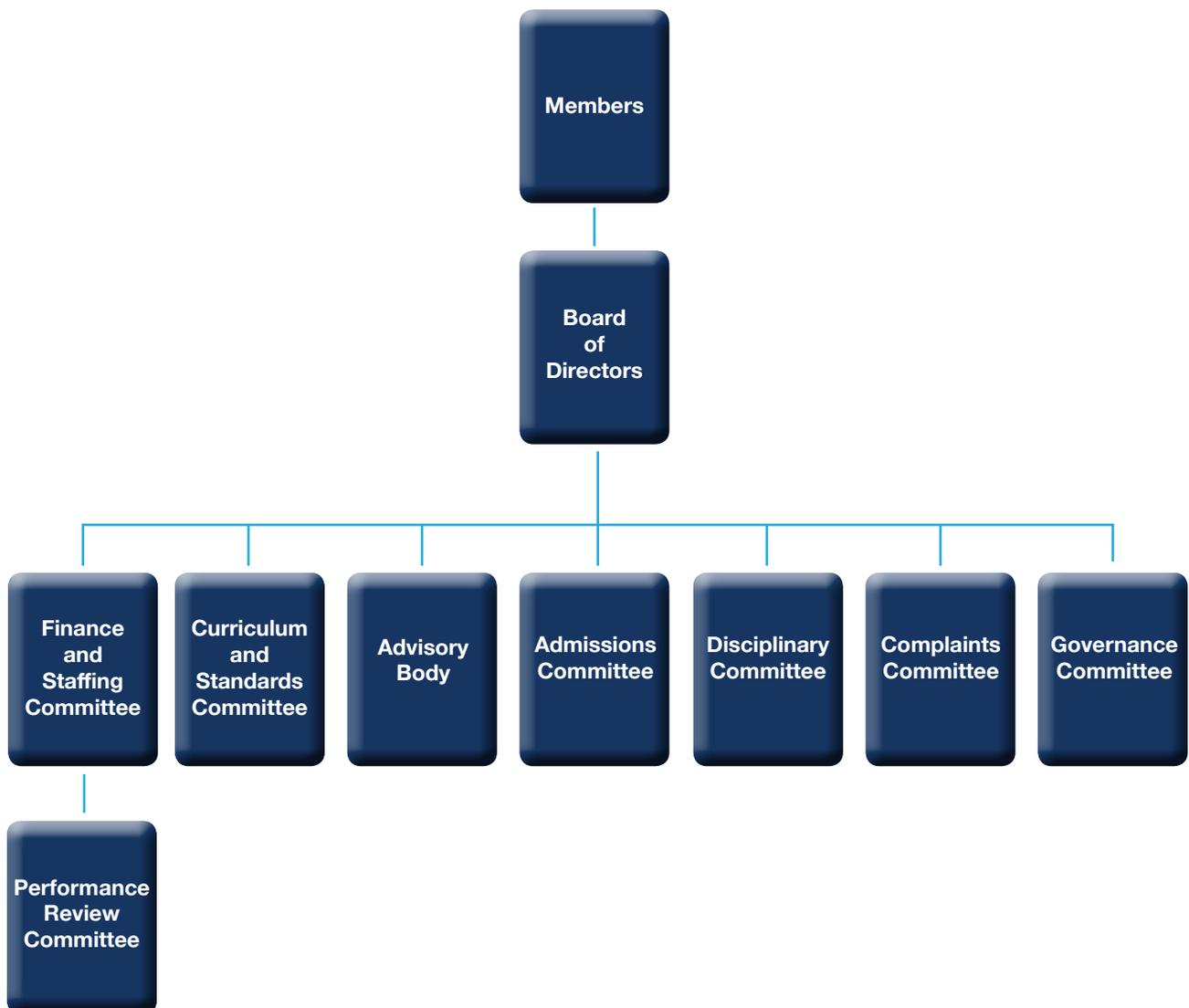
# SOUTH TYNESIDE ACADEMY TRUST GOVERNANCE OVERVIEW

## Governance Structure

---

South Tyneside Academy Trust  
Sponsored by South Tyneside College  
**Current Structure**

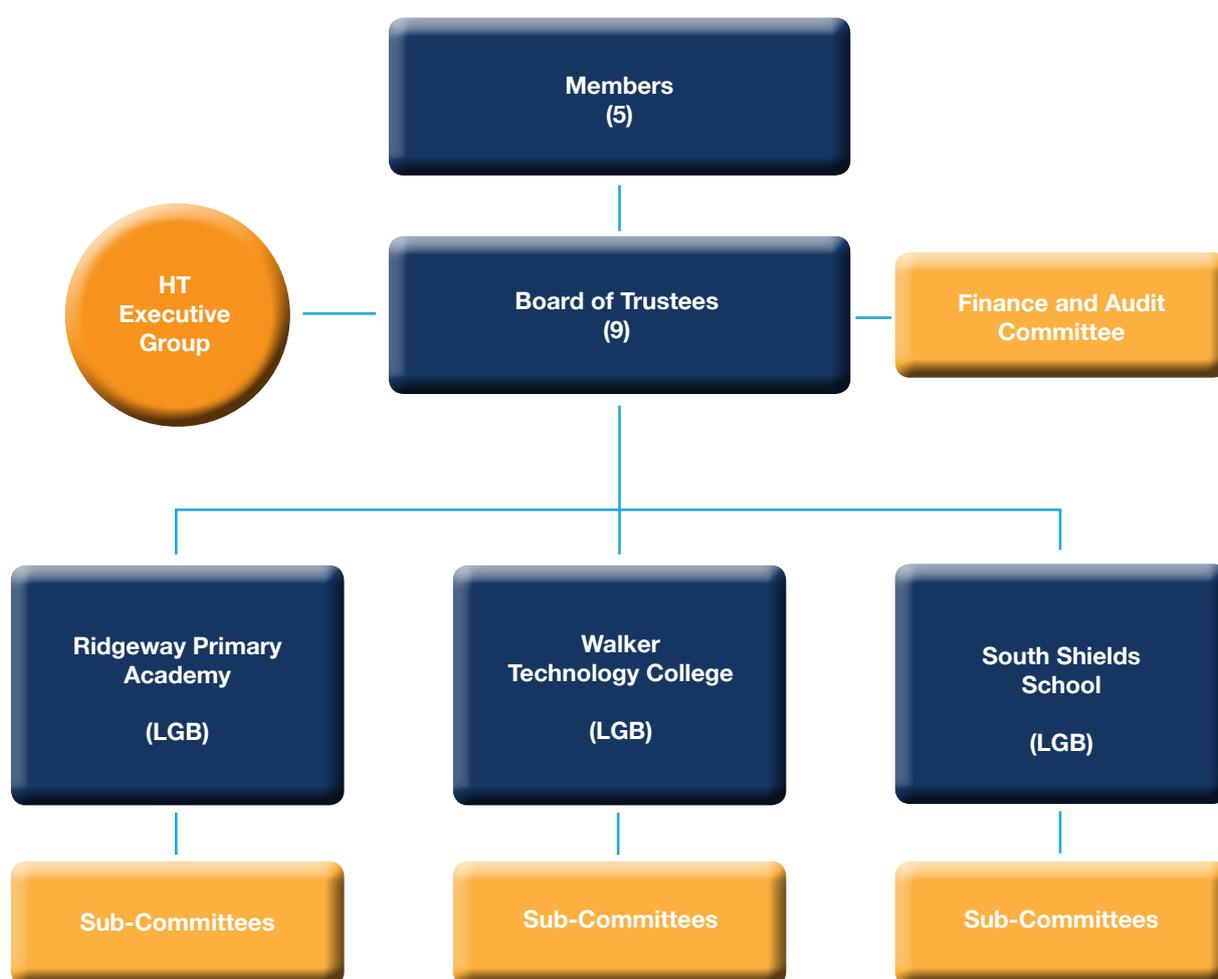
---



---

South Tyneside Academy Trust  
Sponsored by South Tyneside College  
**Proposed Structure**

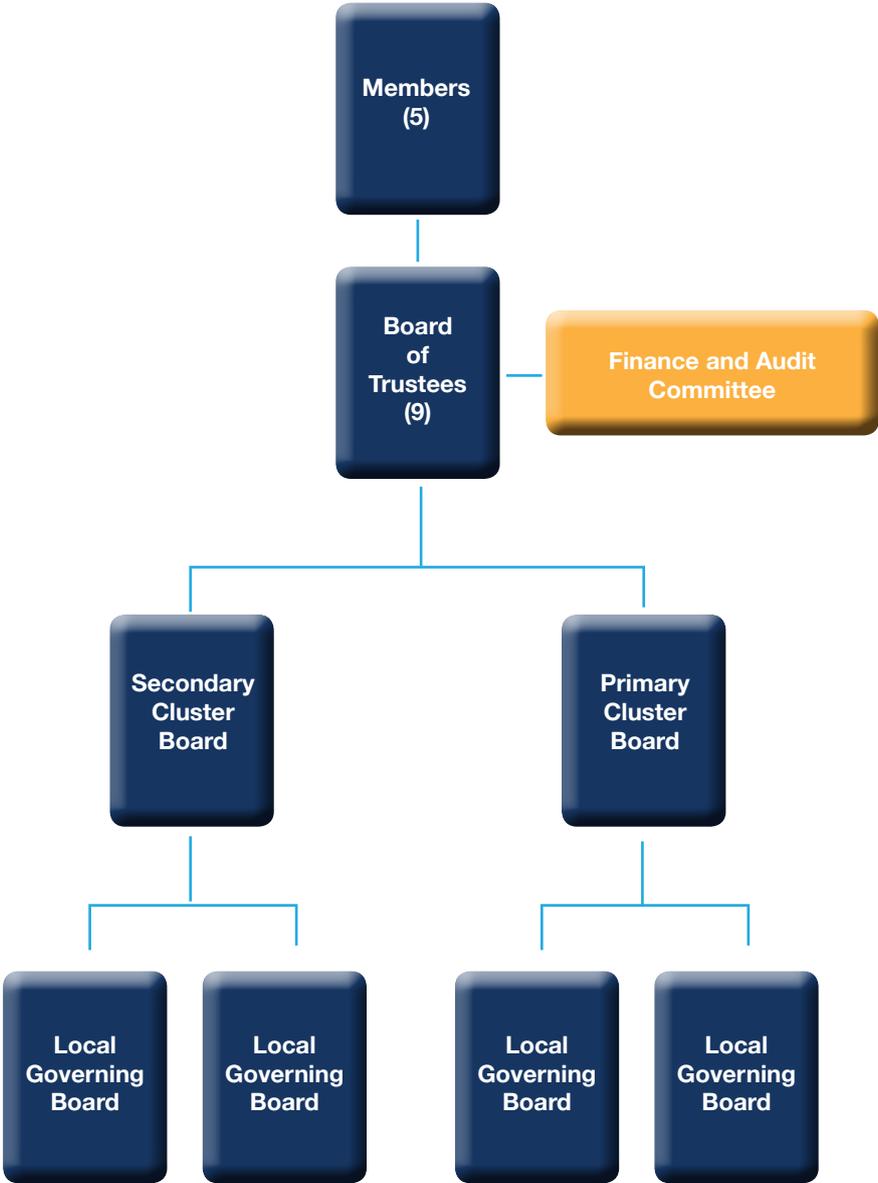
---



---

Tyne Coast Academy Trust  
**Future Structure to support further  
growth proposals in Annex D**

---



# SOUTH TYNESIDE ACADEMY TRUST GOVERNANCE OVERVIEW

---

## About us

South Tyneside Academy Trust sponsored by South Tyneside College is an exempt charity and company limited by guarantee registered in England with company number 8313162. The company's registered office is South Tyneside College, St George's Avenue, South Shields, NE34 6ET.

The Academy Trust was established in 2012, and is formally known as South Tyneside College Academy Trust. It is expected that when the new Articles are adopted the name of the Trust will change again to Tyne Coast Academy Trust to reflect the merger between the sponsor, South Tyneside College, and Tyne Metropolitan College.

This Academy Trust is governed by Articles of Association and registered as a company with Companies House. The Articles of Association define how the company must be run, and the Objects within set out the purpose and activities of the company.

As an exempt charity, we are also governed by the Charities Act 2011 and must also comply with the requirements of the Companies Act 2006.

Our Master Funding Agreement with the Department for Education sets out the terms under which we are funded and must deliver education to the children and young people within our communities. As such we have a statutory duty under the Education Act to meet legal obligations for the provision of education, training and childcare.

The Financial Academies Handbook sets out the financial management, control and reporting requirements that apply to Academy Trusts. It describes a financial framework for trusts and guidance on how to meet the requirements of the Education Funding Agency (an executive agency sponsored by the Department for Education to manage education finance). Compliance with the Academies Financial Handbook is a condition within our Master Funding Agreement with the Department for Education.

## Governance

South Tyneside Academy Trust sponsored by South Tyneside College is a multi-academy trust with one shared vision - details of the governance structure are outlined above.

South Tyneside Academy Trust sponsored by South Tyneside College will ensure compliance with all statutory obligations as prescribed by the DfE, EFA and The Charity Commission. It is a single employer and will maintain a single pay structure to ensure equal pay across its structure within any external local restrictions.

The Trust Board's scheme of delegation provides a framework in which the multi-academy trust is governed and whilst the members and trustees are ultimately responsible for the performance of the trust, this is a responsibility that is shared according to capacity, with Local Governing Boards (LGB) who fully reflect the local needs of their communities.

## Members

- a. Responsibility and remit - sign off the Articles of Association. Power to appoint and remove the trustees and governors. Secure the highest standards of accountability from trustees for the provision of education for all pupils in the MAT.
- b. Composition - to be five members at any one time.
- c. Appointed by current members.

---

## Trustees

- a. Responsibility and remit - trustees are responsible for:
  - Delivering the charitable objects of the trust;
  - Strategically controlling the organisation and managing the charitable assets.
- b. Composition - to be a maximum of nine.  
**Roles:**
  - Chair/Vice-Chair - the Chair and Vice Chair will be appointed by the trustees with prior approval of the sponsor;
  - CEO (ex-officio).
- c. How appointed - the CEO is an ex-officio member of the Board of Trustees. The Chair of the LGB will become a Co-opted Trustee. The remaining trustees will be recruited according to skills and expertise needed by the Board.
- d. Term of office – trustees will have a term of office of up to four years. Re-appointments will not be automatic and the maximum length of office in total is eight years. In exceptional circumstances, the members may allow this to be extended.

## Cluster Boards

- a. Responsibility and remit - to provide challenge and support for the local governing boards. To secure accountability for the educational standards of academies in the cluster and report to the board of trustees through the chair.
- b. Composition - one trustee to chair the Cluster Board, all chairs and headteachers of local governing boards are ex officio members.
- c. How appointed - trustees appoint the chair of the Cluster Board which will be reviewed on an annual basis by the trustees.
- d. Term of office - by appointment or ex officio.

## Local Governing Boards

- a. Responsibility and remit - the trustees are responsible for the performance of each of the academies in the MAT. However, the range and level of responsibilities may be delegated to the Local Governing Board(s). This may vary according to the strength and capacity of the school.

### Delegated powers

All schools within the MAT will be subject to annual review. Where a school/academy joins the MAT with a poor Ofsted grade, the governing body may be replaced by an advisory body.

- b. Composition - the maximum size is 15, unless there are exceptional circumstances. Such circumstances would be where a school joins the MAT with an established and successful governing body (this will reduce to 15 over an appropriate period of time):
  - Chair and Vice Chair to be appointed;
  - Up to two parent governors;
  - One staff governor.

The total number of staff governors to serve on the LGB (including the Principal) shall not exceed one third of the total number of governors on the LGB.

## REGISTER OF MEMBERS AND TRUSTEES (AS AT 21.2.17)

Name of Members	Membership Category	Address	Date of 1st Appointment/ Reappointment	Period of Appointment	Date Resigned/ Removed
<i>Liability is limited. Every member agrees to undertake to contribute a sum to the company's assets if wound up while a Member or within 1 year after ceasing to be a Member, not exceeding £10.</i>					
Dr Lindsey J Whiterod OBE	Member	c/o South Tyneside College	Initial signatory to the Memorandum 29-11-12	N/A	When new Articles implemented est. 1-9-17
Mr Andrew Watts	Member	c/o South Tyneside College	Appointed by Sponsor 25-03-15	Until office of Chair on Sponsor Board ends	
Mrs Christine S Smith	Member	c/o South Tyneside College	Chair of Directors 23-10-14	Until office of Chair on Academy Board ends	
Dr Malcolm Grady	Member	c/o South Tyneside College	20-10-16	Until removed/ resigns	

Name of Trustees	Membership Category	Address	Date of 1st Appointment/ Reappointment	Period of Appointment	Date Resigned/ Removed
Mr R J Whitelaw	Trustee	c/o South Tyneside College	29-11-12 & 29-11-16	4 Years	
Mr L Watson	Trustee	c/o South Tyneside College	29-11-12 & 29-11-16	4 Years	
Dr L J Whiterod OBE	Trustee/ Accounting Officer/CEO	c/o South Tyneside College	29-11-12	N/A	
Mr A Watts	Trustee	c/o South Tyneside College	19-12-12 & 19-12-16	4 years	
Mrs C S Smith	Trustee	c/o South Tyneside College	19-12-12 & 19-12-16	4 years	
Mr M McCarthy	Trustee (staff)	c/o South Tyneside College	11-12-14	4 years	When new Articles implemented est. 1-9-17
Mr A Golden	Trustee (staff)	c/o South Tyneside College	6-1-14	4 years	When new Articles implemented est. 1-9-17
Ms K Brennan	Trustee (staff)	c/o South Tyneside College	6-1-16	4 years	When new Articles implemented est. 1-9-17
Mrs H Watson	Trustee	c/o South Tyneside College	4-7-13	4 years	
Mr R Staward	Trustee	c/o South Tyneside College	19-12-12 & 19-12-16	4 years	
Dr B Malik	Trustee	c/o South Tyneside College	19-12-12 & 19-12-16	4 years	
Dr A Lopes	Trustee	c/o South Tyneside College	1-9-16	4 years	
Miss S Moffett	Trustee (parent)	c/o South Tyneside College	1-9-16	4 years	When new Articles implemented est. 1-9-17

The address for members and trustees is c/o South Tyneside College.  
The Academy Trust was incorporated on 29 November 2012.  
Accounting reference date: 31 August.

## MEMBERS

---

---

### Andrew Watts

---



Andrew Watts is the Executive Director of 'Changing Places and Changing Lives' Charity Groundwork South Tyneside and Newcastle, and he is the current Chair of Governors at South Tyneside College, the Academy Trust's sponsor. His priorities include building greater business and community partnerships, and increasing educational opportunities and outcomes for all students.

Andrew spent 15 years working in the public sector in various environmental positions before joining Groundwork in 2005. His role as Executive Director is varied but includes helping create strategic partnerships across Tyneside and developing Groundwork's asset portfolio, which includes the One Trinity Green business centre in South Shields and The Beacon Enterprise Centre in Newcastle. He is also an active board member of a voluntary sector organisation in South Tyneside.

---

### Dr Malcolm Grady

---



Dr Malcolm Grady graduated from York University in 1973 with a degree in History/Education, and completed a PGCE the following year. He then began his teaching career in secondary schools in South Tyneside, during which time he was awarded a School Teacher Fellowship at St Chad's College, Durham University. After completing a Masters in Education at Durham, Malcolm moved into educational administration at Newcastle and South Tyneside local education authorities, working in fields such as adult education and Further Education, school governance, school workforce development, succession planning and Ofsted inspections. He also contributed to several national organisations in an educational advisory capacity, such as the BBC Schools Broadcasting Council, the National Institute for Continuing Education and the National Employers Organisation for School Teachers.

---

## Christine Smith



Christine Smith, the current Chair of the Board of Directors, is driven by a keen determination to help young people achieve through education and to ensure that the highest quality of learning environment is in place so they can reach their potential. She worked as a headteacher at primary schools in Washington and Gateshead, and was also Head of Transitional Wellbeing at South Tyneside Council. Now retired, she lives in Gateshead, and is married with a son and a daughter

---

## Dr Lindsey Whiterod OBE



Dr Lindsey Whiterod OBE is the Chief Executive of South Tyneside College and Chief Executive of the Academy Trust. Lindsey has overseen a rapid rise in education standards at South Tyneside College since introducing a new focus on vocational qualifications after becoming Chief Executive in October 2009.

## DIRECTORS (TRUSTEES)

[Andrew Watts](#) (see Members)  
[Christine Smith](#) (see Members)  
[Dr Lindsey Whiterod OBE](#) (see CEO)

---

### Ray Staward



Ray Staward, a chartered public finance and chartered certified accountant with experience of local and central Government, the health and education sectors and the water industry in the UK and overseas, became a director of the Academy Trust in 2012. A retired member of the Chartered Management Institute, he has worked within several Tyneside councils and with Newcastle Area Health Authority, Sunderland and South Shields Water Company, the Audit Commission and Northumbria University. He was also Chief Accountant to Cape Town City Council, the Corporate Accountant to Botswana Water Utilities Corporation, adviser to the Auditor General of Tanzania, Finance Manager for an urban development programme in Swaziland, resident consultant to the City of St Petersburg, and municipal finance expert in Moscow.

Ray was a governor at South Tyneside College for eight years, and he is the Independent Person for South Tyneside Council, maintaining standards of conduct among elected and co-opted members. A sports enthusiast, he is a Newcastle United season ticket holder and a member of Durham County Cricket Club.

### Robert J Whitelaw



Robert Whitelaw, a chartered accountant and formerly Finance Director with a major North East group of companies, brings vast experience of financial management to his position of director, a role he has held since 2012. Robert was a governor at South Tyneside College for eight years and is a former member of the Academy Trust. Mixing financial experience with a strong business acumen has allowed Robert, a married father-of-two and grandfather-of-four, who lives in Cleadon, South Tyneside, to help the college remain financially strong and to progress a buoyant business model, despite funding challenges.

---

## Les Watson



Retired Audit Commission Inspector Les Watson has been a director since 2012. Les was a governor at South Tyneside College for eight years and is a former member of the Academy Trust.

He began his career as a maths teacher at a Sunderland comprehensive school, and then worked as a community education tutor in South Tyneside, while continuing to teach part-time.

In the mid-1980s he began working within South Tyneside Council's education department as a service manager, a post he held until 1999 when he was appointed an inspector with education standards agency Ofsted. A year later, he started working as an Audit Commission Inspector, mainly of services within local authorities across the country. The father-of-five, who lives in West Boldon, South Tyneside, and retired in 2011, became a governor and a director so that his wide career experience could be used to benefit others.

---

## Dr Bashir Malik



Dr Bashir Malik, who became a director of the Academy Trust in 2012, enjoyed a medical career that spanned three continents and five decades and saw him specialise in paediatrics and public health. Brought up in Kenya, he began studying medicine in that country but left to progress his training in Pakistan, returning to work at a clinic in Nairobi five years later. He came to the UK in 1971, and worked in paediatrics at hospitals in Coventry and Rugby, before becoming Registrar in Paediatrics at the former South Shields General Hospital in 1975. He then moved to Wales to train in public health but returned to South Shields in 1982 as Consultant in Public Health and Communicable Diseases for Gateshead and South Tyneside Health Authority, a position he held until his retirement in 2005. Dr Malik, a father-of-three, has also been a governor at South Tyneside NHS Trust and at South Tyneside College. His childhood in Kenya embellished him with a firm belief in the power of education as an equalising but positive force in society, a view that inspired him to work to improve the education and prospects of students.

## DIRECTORS (TRUSTEES)

---

### Mrs Helen Watson



Helen Watson held the position of Corporate Director for Children, Adults and Families at South Tyneside Council for seven years until she left to become Director of Strategy at Cafcass (Children and Family Court Advisory and Support Service) in September 2015. Her other previous roles include Head of Children's Services at North Tyneside Council, which she held for over four years, from 2003. Helen has an MBA from the Open University, a Master's degree in sociology and social policy from the University of Durham, a BA in history from Kings College London, and gained a postgraduate qualification in social work after studying at University College Cardiff. Helen's volunteer experience and causes cover several areas including animal welfare, children, civil rights and social action, economic empowerment and education.

### Dr Ana Lopes



Dr Ana Lopes, who was born in Portugal but who now lives in South Tyneside, joined the Board as a director in 2016. She gained an MBA from the University of Porto, and later a sociology PhD from the University of East London. Ana is passionate about education, especially about issues of equalities and inclusivity. As an educator in tertiary education, a researcher and a community organiser, she aims to make a positive difference to children's lives and the community around her. Dr Lopes, who works at Newcastle University, is a mid-career academic and her research area comprises employment relations and human resource management. Ana is a member of the Executive Board of the British Universities Industrial Relations Association (BUIRA), an Associate Fellow of the Chartered Institute Personnel and Development (CIPD) and an Associate Fellow of the Higher Education Academy (HEA).

ANNEX B

# Our Academies

## ANNEX A

### Our Academies | Ridgeway Primary Academy



## ‘Proud, Unique, Ambitious’



Proud • Unique • Ambitious

Ridgeway Primary Academy aims to create a nurturing and stimulating learning environment in which children can achieve their full potential. Staff are proud of recent achievements, which include an improved Ofsted rating of ‘Good’ in November 2016, and being named the country’s most improved mainstream primary for progress in writing at the end of Key Stage 2 - and the thirteenth most improved in reading, writing and maths combined - in December 2016.

The South Shields school’s outstanding leadership, teachers and governors are dedicated to making it a special and unique place to learn and to providing an enjoyable, stimulating and unforgettable experience for pupils. Each learner is nurtured in an environment where all are encouraged and supported to work to the best of their ability and to be outstanding. Recognising how important this is, a rich and varied curriculum, packed full of exciting learning opportunities, is delivered.

Although passionate about helping learners to achieve educational success and setting the groundwork for life-long attainment, Ridgeway’s dedicated team of teaching staff also work to make it a place where effort and commitment are equally highly valued. The school’s engaging and broad curriculum meets the needs of pupils but also encourages independent thinking and the joy of discovery, and presents opportunities for children to explore the world of education and be creative.

Staff are skilled in using a variety of learning and teaching approaches so that children experience a wide range of interesting activities and challenges, and every pupil is guaranteed the support and opportunity to become a successful learner and confident individual.

The academy model means Ridgeway has the flexibility to make the curriculum work to maximum potential for pupils.

## RIDGEWAY ACADEMY EXECUTIVE TEAM

---

### Michael McCarthy

---



Michael McCarthy joined Ridgeway as Headteacher in July 2013, and he has played a key role in its success, developing the curriculum and engaging children, staff and the community in Ridgeway's ongoing journey of achieving an Ofsted 'Outstanding'. He is responsible for establishing a culture of excellence, equality and high expectations for all pupils and staff; identifying priorities for continuous improvement; raising standards; developing partnerships with the wider community; but he is also the friendly face of the school. Through his vision and leadership, Ridgeway is now the most successful primary school in South Tyneside for more able children as well as having progress in the top 250 primary schools nationally, including being the mainstream primary school with the best writing progress in England and Wales in 2016, out of over 21,000 schools.

### Alex Golden

---



Alex Golden has worked at Ridgeway since 2012, initially in a teaching role. Appointed Deputy Headteacher and Special Educational Needs Co-ordinator shortly after Michael's arrival, he is involved in the operational aspects of the academy, driving high standards of practice and ensuring that nothing stops the children receiving the very best.

### Melissa Baker

---



Melissa Baker joined Ridgeway in 2014 as the academy's Early Years Lead. Her passion for Early Years has ensured that children make rapid progress from the moment they join Ridgeway to the end of Reception. Now the school's Assistant Head, she also brings the same drive and enthusiasm to Key Stage 1. Melissa has been responsible for Early Years data improving year-on-year (33% - 50% - 60% - 66%).

## PUPIL NUMBERS

Year Group	Number of Pupils
Nursery	41
Reception	34 in two classes (17 and 17)
Year 1	55 in two classes (25 and 30)
Year 2	35 in two classes (17 and 18)
Year 3	26
Year 4	27
Year 5	35 in two classes (17 and 18)
Year 6	23 in two classes (11 and 12)
<b>Total</b>	<b>276</b>

## SUMMARY OF PERFORMANCE

### Early Years

#### Year 1 phonics screen

67% good level of development

87% met the standard

#### Year 2 / Key Stage 1 outcomes:

Reading

87% required standard and 17% working at greater depth

Writing

87% required standard and 17% working at greater depth

Maths

87% required standard and 22% working at greater depth

Combined RWM

87% required standard and 13% working at greater depth

#### Year 6 / Key Stage 2 outcomes:

Reading

35% required standard and 24% working at greater depth

Writing

88% required standard and 24% working at greater depth

Maths

74% required standard and 20% working at greater depth

Combined RWM

52% required standard and 16% working at greater depth

#### Year 6 / Key Stage 2 progress:

Reading

+6.0

Writing

+10.4

Maths

+6.9

# RIDGEWAY OFSTED PERFORMANCE

---

## Ridgeway Primary Academy

Park Avenue, South Shields, Tyne and Wear NE34 8AB

<b>Inspection dates</b>	17–18 November 2016
<b>Overall effectiveness</b>	<b>Good</b>
Effectiveness of leadership and management	<b>Good</b>
Quality of teaching, learning and assessment	<b>Good</b>
Personal development, behaviour and welfare	<b>Good</b>
Outcomes for pupils	<b>Good</b>
Early years provision	<b>Good</b>
Overall effectiveness at previous inspection	Requires improvement

## Summary of key findings for parents and pupils

### This is a good school

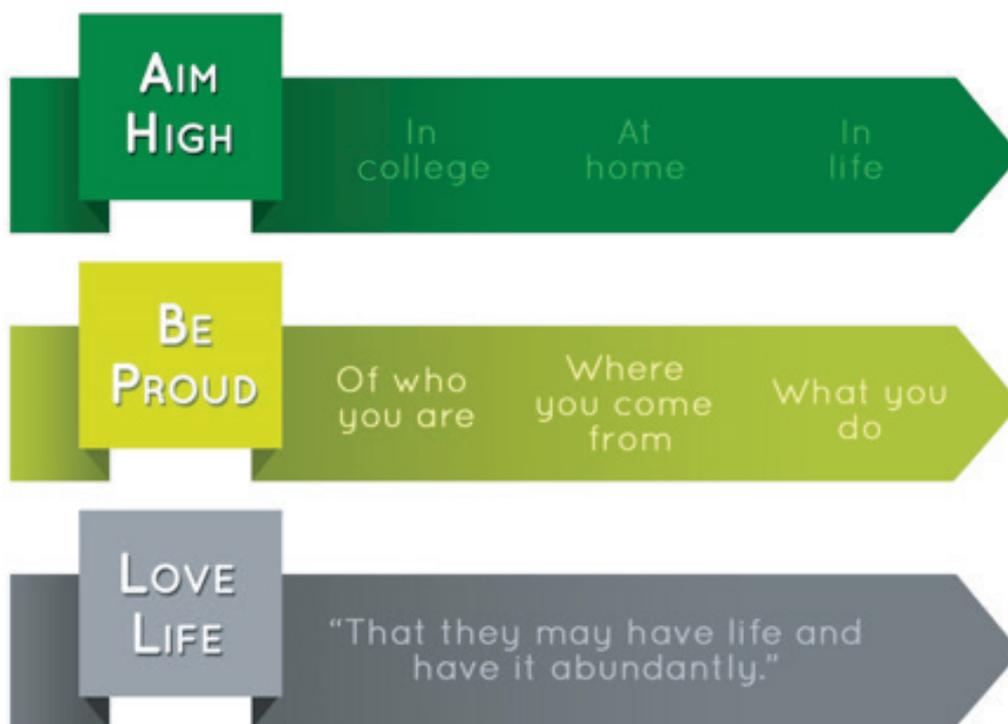
---

- The head teacher, other senior leaders and governors have worked tirelessly to transform the school since it became an academy. They have a shared drive and vision for pupils and staff to excel.
- Working together, senior leaders and governors have further improved teaching and learning in the past two years. The vast majority of pupils now make good progress from their different starting points, including disadvantaged pupils and the most able.
- Pupils' achievement is considerably better than at the time of the previous inspection. The proportion of pupils who reach the expected standard in the Year 1 phonics check has risen rapidly. Phonics teaching is good across the school.
- Middle leaders have not had such a positive impact upon improving pupils' standards as those in charge of English and mathematics. Middle leaders' plans to improve teaching in foundation subjects are not yet as robust as those produced by senior leaders.
- In 2016, Year 6 pupils made excellent progress in mathematics and writing. Staff teach these two subjects particularly well so that standards have increased for all groups of pupils.
- Pupils also made good progress in reading last year. However, standards in reading are not yet as high as those seen in writing and mathematics.
- Pupils have positive attitudes to learning. They enjoy school because their lessons are challenging and engaging. Pupils are enthusiastic learners but often do not take enough care with their spelling and handwriting
- Pupils demonstrate very good conduct around school. Senior leaders have established a calm and orderly environment.
- Governors have a robust understanding of the school's strengths and areas for development. They challenge leaders effectively to ensure continuous improvement and offer support to staff by providing many opportunities for training and development.
- The early years provision is good. Children's progress is particularly strong in Reception. Staff plan activities thoughtfully to meet the specific needs of individuals and the proportion of children who reach a good level of development has increased.
- Parents agree that their children are safe and well cared for by staff in the school.

**ANNEX B**

# **Our Proposed New Academies**

## College Ethos and Values Statement



Walker Technology College is an 11-19 all ability college, built upon a starting premise that everyone is made to feel welcome, safe and supported. The college is an inclusive community that believes in maintaining strong partnerships with parents/carers and students to ensure that learners thrive in a secure and stimulating environment. The college is committed to providing a quality education where the individual is valued and respected.

The college community is tolerant and respectful of the rich cultural diversity in Walker, and provides students with the skills and knowledge they need for a life after education. Students graduate from the college with a sense of self-knowledge, self-esteem and self-confidence. The college promotes a climate in which young people feel safe and secure. Students learn the essence of what is right and wrong and they are encouraged to accept personal responsibility for their role within their community. The college fosters an environment of tolerance and harmony between different cultural traditions by enabling students to acquire an appreciation of, and respect for, their own and other cultures and celebrate the British values of democracy, the rule of law, individual liberty and mutual respect.

High standards of dress, behaviour and achievement are at the core of the college, with no exception. The college celebrates unique and longstanding traditions that promote opportunities for memorable curriculum, to leave a lasting impression on all our stakeholders.

---

## Equality and Opportunities

At Walker Technology College, equality and opportunity are championed and encouraged. Every member of staff promotes these values in all aspects of college life. The college has an incredible pastoral care system which supports students in fulfilling their opportunities, whilst also ensuring their safeguarding is of the utmost priority. All students are treated equally, and the college has robust and established systems in place to ensure these principles are upheld.

The college weekly assembly programme addresses current SMSC issues, promoting British values and cultural and moral issues. These themes are further developed during registration time and in lessons across the curriculum. Through 'Student Voice', issues that directly affect students are discussed openly, problems aired and solutions found. In addition, the equality and diversity team offer students a safe, secure and, if required, confidential system that supports students' needs, working closely with the pastoral care system. Through their CEIAG programme, the college aims to maximise the opportunities available for all students for Further Education, employment and development.

## Cohort Numbers 2016/2017

Year Group	Number of Students
Year 7	213
Year 8	187
Year 9	218
Year 10	191
Year 11	201
Years 12/13	88
Charles Parsons	12

## Intake Primary Schools for 2017/2018 Year 7

School name	First Choice	Reserve
Benton Park Primary School	1	
Byker Primary School	9	11
Carville Primary School	6	4
Central Walker C of E Controlled Primary School	31	1
Chillingham Road Primary School		
Christ Church CE Primary School		
Hawthorn Primary School	1	1
Hotspur Primary School		
Moorside Community Primary School		1
Ravenswood Primary School	1	1
Richardson Dees Primary School		
St Alban's RC Primary School	6	3
St Joseph's Catholic Primary School		1
St Lawrence's RC Primary School	20	1
St Paul's CE Primary School		1
St Vincent's RC Primary School	8	3
Thomas Walling Primary School	1	1
Tyneview Primary School	18	4
Walkergate Primary School	47	15
Welbeck Academy	36	6
West Walker Primary School	11	
Western Community Primary School		1
Westgate Hill Primary School		
<b>Grand Total</b>	<b>196</b>	<b>55</b>

## SENIOR LEADERSHIP

---

### Mike Collier

Headteacher



#### Personal Achievements

- Presenting Good Practice sessions for SSAT in Atlanta, Beijing and in numerous locations in the UK from 2004/2010. A member of the SSAT 'Future's Vision' group during this time.
- Established one of the first pathfinder Combined Cadet Forces in a state school. The CCF now has over 100 cadets at Walker Technology College.
- Member of the LA PFI bid evaluation process for the ICT Services tendering process in PFI 2.
- Designing and opening as Headteacher a £30m new PFI School in September 2011. Also made the 'Design Week' Top 50 list for creativity in design.
- Invitation to speak with John Denholm MP at 11 Downing Street, regarding the establishment of the Department of Innovation and Skills in 2011. Successful visits planned and hosted for Tony Blair 2013 and Gordon Brown 2014.
- Led Walker Technology College to being the most improved school in Newcastle upon Tyne for 5A\*-CEM September over four years in 2015 (20% growth in four years).
- Link Ofsted Governor at Central Walker CofE Primary School. The school received a section 5 inspection verdict of 'Good with many outstanding features' in March 2014, with particular reference to strength of governance.
- Governor at Linhope Pupil Referral Unit. The school received a section 5 inspection verdict of 'Good with many outstanding features' in March 2014.
- Leading on the expansion of Alternative Provision in East Newcastle, resulting in a satellite centre with 20 additional EFA funded places established for Linhope Pupil Referral Unit in April 2014.
- Leading Walker Technology College from National Challenge, through 'Requires Improvement' to a section 5 inspection verdict of 'Good with many outstanding features', in May 2014.
- Leading developments on the Riverside Learning Trust. This is an incorporated trust of two secondary schools and four primary schools that was formed officially in November 2014.
- One day's absence through sickness in almost 21 years' continuous service with Newcastle City Council.

## SENIOR LEADERSHIP

---

---

### Jacqueline Carr | Deputy Head Curriculum and Outcomes

---



- Worked at Walker Technology College for over 20 years.
- Head of Business Studies for four years.
- Head of Sixth Form.
- Head of School (Grainger).
- Employed by Northern Education on a two-term secondment from January to September 2015 to support Blyth Academy following an Ofsted grade 4. Following an Ofsted inspection in May 2015, Blyth Academy received a grade 3.
- NPQH.

---

### Peter Robson | Senior Head of School Pastoral

---



- Worked at Walker Technology College for 20 years.
- Head of RE for five years.
- Thirteen years' experience in the college pastoral system.
- Qualified and accredited in a number of areas, including performance coaching, counselling, restorative practice and safeguarding.

---

---

## Carolyn Bertram | Assistant Head Business Management and Personnel

---



- Worked at Walker Technology College for 29 years.
- Head of Business Studies for four years.
- Safer Recruitment trained.
- D32 and 33 assessor qualified.
- NPQH.

---

---

## Debra Hudson | Assistant Head Teacher Learning and Teaching

---



- Worked at Walker Technology College for eight years.
- Head of English and SENCO for six years.
- SLT responsible for:
  - teaching and learning
  - monitoring for quality learning
  - middle leaders

# WALKER TECHNOLOGY COLLEGE OFSTED PERFORMANCE

---

## Walker Technology College

Waverdale Avenue, Walker, Newcastle Upon Tyne, NE6 4LA

<b>Inspection dates</b>	21-22 May 2014	
<b>Overall effectiveness</b> at previous inspection	Requires improvement	3
This inspection	<b>Good</b>	<b>2</b>
Achievement of pupils	Good	2
Quality of teaching	Good	2
Behaviour and safety of pupils	Good	2
Leadership and management	Good	2

## Summary of key findings for parents and pupils

### This is a good school

---

- Excellent leadership by the headteacher has driven rapid improvements across the school since the last inspection.
- All groups of students make good progress from their different starting points. Standards in the school are rising quickly year on year, because students are convinced that if they work hard, they will succeed.
- Teachers are enthusiastic and eager to improve their skills further. Their dedication to helping students achieve their best is acknowledged and appreciated by students in all age groups.
- Students behave well in lessons and their behaviour in corridors is excellent. They feel safe and show high levels of respect for themselves, staff and each other.
- Excellent pastoral care makes sure that students are well cared for and know where to turn for help.
- The sixth form is good. Good leadership has developed the curriculum well since the last inspection, and this is successfully helping students to move on to higher education, training or employment.
- Senior leaders fully support the headteacher's ambitious visions for the school. Their work ensures that progress is rapid and sustained.
- Middle leaders, including subject and pastoral leaders, are skilled and determined in their drive to further improve outcomes for students.
- Governors are highly supportive of the school. They have a good understanding of the quality of teaching and are fully involved in improving teaching by holding staff to account for students' performance.

### It is not yet an outstanding school because

---

- Provision provided by the Year 7 Catch-up funding, does not include all the students who would benefit from the school's well-planned and successful programme to improve writing.
- Writing in other subjects is not well enough developed to allow students, especially those of lower ability, to demonstrate their good learning.

## WALKER TECHNOLOGY COLLEGE – FINANCIAL ANALYSIS

---

Walker Technology College, as a local authority maintained school, has an April to March year.

The school has provided year to date financial information, alongside a forecast for the year end and preliminary budget information for the following three years, with 2017/2018 being relatively certain for income, and the following two years prepared on the assumption of either a 1.5% reduction in rates (the current harmonisation amount the Department for Education reduces a school's budget by) or a 2.6% reduction (based on the new schools methodology funding tool). Most costs have been kept consistent with the 2017/2018 budget figures, so there is no allowance for inflation in these figures. The brought forward position also needs to be verified as part of due diligence. The future years' figures are only indicative at this stage.

The school has a significant deficit currently (over £700k) which would transfer to the Academy Trust at conversion. The plans show that they are addressing the deficit in the budgets and they take account of costs of restructuring in the budget, but do not consider inflation, etc, in non-pay.

The school is a PFI school and it is not yet clear how much of the PFI contract costs would be covered by the additional funding from EFA for PFI and the details of this contract would form a significant part of the due diligence review prior to conversion.

The figures assume the school roll remains consistent, which is reasonable as there are a similar number of applications to join the school in September as will be leaving in the summer.

This information has been put into a format more consistent with the academy format, for ease of review. There is no balance sheet information available as the main assets, etc, are on the council register.

# WALKER TECHNOLOGY COLLEGE – FINANCIAL ANALYSIS

	Forecast 2016/17	Budget 2017/18	Budget 2018/19	Budget 2018/19	Budget 2019/20	Budget 2019/20
	£	£	£	1.5%	2.6%	1.5%
	£	£	£	£	£	£
<b>Income</b>						
<b>Main Grant Income</b>						
School Allocation	6,037,280	6,256,057	6,162,216	6,093,400	6,162,216	6,093,400
LA payment	(8,570)	-	-	-	-	-
Post 16 Allocation	795,590	586,590	586,590	586,590	586,590	586,590
Post 16 SEN	84,500	84,500	84,500	84,500	84,500	84,500
SEN	19,370	19,370	19,370	19,370	19,370	19,370
SEN adjustment	22,390					
	6,950,560	6,946,517	6,852,676	6,783,860	6,852,676	6,783,860
<b>Other Income</b>						
Pupil Premium	616,010	619,750	619,750	619,750	619,750	619,750
Other Grants	10,520	9,951	9,951	9,951	9,951	9,951
School Meals Recharges	8,000	8,000	8,000	8,000	8,000	8,000
Miscellaneous Income	141,570	141,570	141,570	141,570	141,570	141,570
Donations	37,855	4,000	4,000	4,000	4,000	4,000
Capital	0					
Premises Rentals	18,200	18,200	18,200	18,200	18,200	18,200
	832,155	801,471	801,471	801,471	801,471	801,471
<b>Total Forecast Income</b>	<b>7,782,715</b>	<b>7,747,988</b>	<b>7,654,147</b>	<b>7,585,331</b>	<b>7,654,147</b>	<b>7,585,331</b>
<b>Pay</b>						
Teachers Pay	4,889,801	4,865,048	4,707,150	4,707,150	4,583,526	4,583,526
Support Staff	904,637	937,136	875,798	875,798	838,241	838,241
Apprenticeship Levy		29,000	29,000	29,000	29,000	29,000
<b>Total Pay</b>	<b>5,794,438</b>	<b>5,831,184</b>	<b>5,611,948</b>	<b>5,611,948</b>	<b>5,450,767</b>	<b>5,450,767</b>
<b>Non Pay</b>						
Staff Related Costs	32,430	27,230	27,230	27,230	27,230	27,230
Premises Costs	791,010	843,327	843,327	843,327	843,327	843,327
Transport	21,420	21,420	21,420	21,420	21,420	21,420
Supplies and Services	540,789	489,690	489,690	489,690	489,690	489,690
Miscellaneous	78,081	45,750	45,750	45,750	45,750	45,750
LA Purchased Services	395,780	277,057	277,057	277,057	277,057	277,057
Capital	5,000	8,000				
<b>Total Non Pay</b>	<b>1,864,510</b>	<b>1,712,474</b>	<b>1,704,474</b>	<b>1,704,474</b>	<b>1,704,474</b>	<b>1,704,474</b>
<b>Surplus/(loss) pre Severance</b>	<b>123,767</b>	<b>204,330</b>	<b>337,725</b>	<b>268,909</b>	<b>498,906</b>	<b>430,090</b>
Redundancy Costs	(140,000)	(93,289)	(66,663)	(66,663)		
<b>Expected (Loss)/Profit for the Year</b>	<b>(16,233)</b>	<b>111,041</b>	<b>271,062</b>	<b>202,246</b>	<b>498,906</b>	<b>430,090</b>
Deficit B/F	(711,780)	(728,013)	(616,972)	(616,972)	(345,910)	(414,726)
<b>(Deficit)/Surplus c/f</b>	<b>(728,013)</b>	<b>(616,972)</b>	<b>(345,910)</b>	<b>(414,726)</b>	<b>152,996</b>	<b>15,364</b>

# SOUTH SHIELDS SCHOOL



## Mission

South Shields School endeavours to unlock the academic and personal potential of every child, which will in turn prepare them for leadership, community participation and life-long fulfilment. It aims to give students the very best education so that they are highly employable when they leave school and can lead happy and successful lives. Students are supported in any challenges they face, which will help them to develop resilience and be equipped to face any future difficulties. This involves ensuring they have excellent literacy and numeracy skills to help them progress to university or into employment.

The school provides opportunities for students to take part in new experiences and to work together to form a community of learners all aiming for the very best. It has four clear values that are adhered to every day and viewed as being of critical importance.

## Values

### Every child - No excuses

To strive to reach aspirational targets, both personal and academic. To not give excuses, but seek solutions for improvement.

### Lead Learning

To face the challenge of everyone being an active learner. Feedback is encouraged and we accept and give it graciously to improve our chance of success.

### High Expectations

To reach the highest standards with presentation, attendance and behaviour towards others. To know that giving 100% enables the development of skills and attributes to improve employability.

### No Islands

To ensure that every member of 'Team South Shields' feels valued and respected. Responsibility is taken for actions so that the school can develop positive relationships with others.



**Student numbers**

<b>Year Group</b>	<b>Number of Students</b>
Year 7	128
Year 8	144
Year 9	123
Year 10	111
Year 11	122
<b>Total</b>	<b>628</b>



## SOUTH SHIELDS SCHOOL SENIOR TEAM

---

---

### Allie Denholm | Headteacher

---



Prior to taking up headship, Allie Denholm was head of an outstanding science team in a semi-rural comprehensive school. Allie completed an MSc in Science Education, elements of which were published. During this time, Allie achieved Chartered Science Teacher status and worked on various published research projects with King's College London and the Association of Science Education. Allie went on to become Assistant Headteacher, with responsibility for KS4 achievement, during which time the school received a letter from the DfE commending it for rapidly raising attainment.

From there, Allie took up a role at the Hastings Academy as Assistant Principal, a school in a very disadvantaged area of Hastings. As Assistant Principal, she led on the STEM curriculum with a remit to rapidly improve standards across science and computing. Allie subsequently became Vice Principal for Teaching and Learning at the academy and was also accepted onto the Future Leader flagship programme in 2014 and later the Talented Leaders programme in 2015. Allie has a particular passion for supporting women into school leadership and has spoken at a number of events aimed at inspiring women into leadership.

Allie took up post as headteacher at South Shields School in September 2015 after relocating from the South East. Allie is also a non-executive director of STEM Learning and is on the Board of Trustees for the Enthuse partnership, which supports the development of teaching and learning within STEM areas through the National Science Learning Centre. As a strong advocate of Teach First, Allie chairs the North East Teach First school strategy board.

## SOUTH SHIELDS SCHOOL SENIOR TEAM

---

---

### Hijab Zaheer | Associate Headteacher

---



Hijab Zaheer took up post as Associate Headteacher at South Shields School in September 2016. In the previous three academic years, Hijab worked at North Shore Academy in Stockton-On-Tees.

Whilst at North Shore Academy, Hijab held a number of different roles, beginning with leader of the English faculty, and culminating in his final year as Vice Principal. Hijab line managed English, maths and MFL as a middle leader, was responsible for teaching, learning and assessment as an assistant principal, and was responsible for curriculum and achievement as Vice Principal.

Prior to working at North Shore Academy, Hijab spent the first six years of his teaching career at Redcar Academy as an English teacher and Key Stage 4 coordinator in English.

Hijab is currently a member of the Future Leaders 2015 cohort and is enjoying the experience of working closely with the current Headteacher to drive school improvement at all levels.

Prior to his career in education, Hijab worked as a youth worker and supported young people with a range of complex behavioral and social issues such as youth offending, substance abuse and anti-social behavior. It was working with these young people that convinced Hijab that, in order to have the most significant positive impact on young people's futures, he needed to be more of a constant influence on their lives

---

---

## Janey Stubbs | Assistant Headteacher Achievement

---



Janey Stubbs began her career in Nottingham, teaching at Kimberly School Sixth Form. She then relocated to the North East, where she worked at Brinkburn School with a responsibility for business studies and KS3 ICT. Janey joined South Shields School, after the merger of two schools, as Enterprise Coordinator and very quickly became Head of Faculty for Business, ICT and Enterprise.

Janey is passionate about making a difference to students' life chances and was an integral part in securing and leading the Business and Enterprise status for South Shields School. Janey subsequently became Associate Assistant Headteacher, working in achievement and teaching and learning, with a particular focus on the more able students, allowing her to successfully complete her NPQSL. Janey was accepted onto the Future Leaders Foundations Programme in 2016, which delivers intensive leadership training. Janey joined the senior leadership team in September 2016 as Assistant Head for Achievement with a clear focus on closing the gaps for disadvantaged students.

---

---

## Andy Fyfe | Assistant Headteacher Behaviour

---



Andy Fyfe joined South Shields School in April 2016 as a senior consultant, having previously worked at Dixons City Academy and Northumberland CE Academy as Vice Principal. Prior to this, Andy was head of an outstanding visual arts creative faculty.

In his time as a senior leader, Andy has worked within the behaviour management field, having also led on assessment, attendance and staff appraisals systems. Andy joined the Future Leaders Organisation in 2012, and has worked through various aspects of their development programme including Headship Now, Talented Leaders and NPQH.

## SOUTH SHIELDS SCHOOL SENIOR TEAM

---

---

### Catherine Robson | Assistant Headteacher Personal Development and Welfare (SENCO)

---



Catherine is a social sciences teacher, and taught for 12 years in two outstanding 11-19 comprehensive schools in Durham. She then joined Durham local authority, where over the last seven years she has provided additional leadership capacity to several different schools, leading to her current secondment as Assistant Headteacher at South Shields School. Catherine recently passed the OFSTED training programme, completed the Leadership Pathways programme with NCSL, was part of the NLP Practitioner Project and studied for a diploma in performance coaching. Catherine has also started the NASENCO statutory Master's course for SEND provision, and recently completed the Leadership Ready Deputy Headteacher Master's course with Durham University and Northumbria University.

Catherine grew up in Baghdad in the Middle East, where she attended an American International school, but returned to the UK at the end of primary school. At 18, Catherine took a gap year to volunteer as a teacher in a small village school in the Northern Province of Kenya. She then went on to study at Lancaster University, and trained as a teacher at Durham University. In her spare time, Catherine runs summer camps for vulnerable 14-19 year-olds.

---

### Joe Dicocco | Assistant Headteacher Teaching and Learning

---



In September 2016, Joe Dicocco joined South Shields School as Assistant Principal, responsible for teaching and learning. He previously worked for four years at The East Manchester Academy. Joe was Assistant Headteacher in his last year at the academy, and previously was Head of Mathematics and Assistant Head of Mathematics, during which he completed the NPQML qualification. He overhauled the academy's mathematics department, before moving on to leading on teaching and learning strategies across the school. Examinable results rose sharply in 2016, which is something he is immensely proud of. Joe began his career at Fazakerley High School as part of the Teach First scheme, and has also worked at Bede Academy as a maths teacher.

# SOUTH SHIELDS SCHOOL OFSTED PERFORMANCE

---

## South Shields Community School

Nevinson Avenue, South Shields, Tyne and Wear, NE34 8BT

<b>Inspection dates</b>	25-26 June 2014	
<b>Overall effectiveness</b> at previous inspection	Good	2
This inspection	<b>Good</b>	<b>2</b>
Achievement of pupils	Good	2
Quality of teaching	Good	2
Behaviour and safety of pupils	Good	2
Leadership and management	Good	2

## Summary of key findings for parents and pupils

### This is a good school

---

- Standards are rising rapidly across the school. The proportion of current Year 11 students on track to attain five or more good GCSE and equivalent qualifications, including English and mathematics, is just below average. This represents good progress over time.
- Achievement is typically good in all years, especially in English and mathematics. Students with disabilities and special educational needs make particularly good progress, due to well targeted, expert support.
- Teaching is good, with some outstanding practice. Teachers provide interesting and motivating experiences in which students can give of their best.
- Arrangements to keep students safe are good. Students say how much they value the support from all adults. Behaviour is good, and students' attitudes to learning are flourishing.
- Students' spiritual, moral, social and cultural development is promoted well through a range of exciting experiences. 'College' (house) events, and tutor arrangements encourage competition and team work.
- The executive headteacher, head of school, governors and key leaders and managers exude high expectations. They drive improvement relentlessly. As a result, teaching is improving strongly, achievement is rising, and increasing numbers of students are eager for success.

### It is not yet an outstanding school because

---

- A minority of students do not make enough progress over time in mathematics.
- Attendance, although improving, is only just at the national average, and not as high as it should be.
- Not all teachers have high enough expectations and check carefully enough that students work is adjusted if they are not making enough progress.

## SOUTH SHIELDS SCHOOL – FINANCIAL ANALYSIS

---

South Shields School, as a local authority maintained school, has an April to March year.

The school has provided year to date expenditure and sundry income, alongside a forecast for the year end and preliminary budget information for the following three years, with 2017/2018 being relatively certain for income and the following two years prepared on the assumption of an increase of 10 pupils per annum into year 7. It needs to be determined if this is reasonable, given the significant decline in pupils expected in September 2017, where there are currently only around 80 applications against a capacity of 130. No consideration has been made of lagged funding from EFA or the change in funding methodology. Most costs have had an inflation adjustment built into them of 3%. The brought forward position will need to be verified as part of the due diligence. The future years' figures are only indicative at this stage.

The school is currently in surplus, but the projections show this will turn into a deficit in 2018/2019 and no consideration has been made for reductions in staffing or non-pay costs due to a smaller number of pupils at the school. Plans on how to avoid this would either need to be done prior to conversion, or as soon as the school came into the trust. The school is a PFI school and it is not yet clear how much of the PFI contract costs would be covered by the additional funding from EFA for PFI. The details of this contract would form a significant part of the due diligence review prior to conversion.

This information has been put into a format more consistent with the academy format for ease of review. There is no balance sheet information available as the main assets, etc, are on the council register.

---

### 2016/2017

The forecast shows the school being approximately £83k in surplus but due to there being £96k of unallocated costs on the financial information presented so far, it is unclear exactly where the variances have occurred. The current year information does not show grant income or pupil premium income, so has not been included with the budget and forecast information as it is not comparable.

### Budget and Forecast

While it is not explicit, it appears that the reduction in funding of 2.7% expected from the new national funding formula has been taken into account. There is a significant reduction in income anticipated. The miscellaneous income appears low compared to the year to date figures, where there is approximately £40k of income from donation and facilities. However, this would not be enough to offset the fall in grant income.

## SOUTH SHIELDS SCHOOL

	Budget 2017/18	Budget 2018/19	Budget 2019/20
<b>Income</b>			
<b>Main Grant Income</b>			
School Allocation	3,817,724	3,581,564	3,512,786
SEN	138,411	138,411	138,411
	3,956,135	3,719,975	3,651,197
<b>Other Income</b>			
Pupil Premium	441,620	430,000	430,000
Miscellaneous Income	1,300	1,500	1,700
	442,920	431,500	431,700
<b>Total Forecast Income</b>	<b>4,399,055</b>	<b>4,151,475</b>	<b>4,082,897</b>
<b>Pay</b>			
Teachers Pay	2,279,974	2,323,250	2,344,584
Support Staff	671,538	677,839	684,443
Apprenticeship Levy	12,000	12,000	12,000
<b>Total Pay</b>	<b>2,963,512</b>	<b>3,013,089</b>	<b>3,041,027</b>
<b>Non Pay</b>			
Staff Related Costs	69,703	70,443	42,670
Premises Costs	762,854	773,722	784,835
Transport	2,950	2,950	2,950
Supplies and Services	367,238	327,395	327,557
Miscellaneous	111,050	88,050	88,050
Purchased Services	168,981	172,825	176,724
Capital			
<b>Total Non Pay</b>	<b>1,482,776</b>	<b>1,435,385</b>	<b>1,422,786</b>
<b>Surplus/(loss) pre Severance</b>	<b>(47,233)</b>	<b>(296,999)</b>	<b>(380,916)</b>
Redundancy Costs			
<b>Expected (Loss)/Profit for the Year</b>	<b>(47,233)</b>	<b>(296,999)</b>	<b>(380,916)</b>
Deficit B/F	82,000	34,767	(262,232)
<b>(Deficit)/Surplus c/f</b>	<b>34,767</b>	<b>(262,232)</b>	<b>(643,148)</b>
	-4,003,368	-4,016,974	-4,032,113

**ANNEX C**

# **Our Proposed New Academies**

## ANNEX C

### Financial Summary of the MAT

#### South Tyneside Academy Trust

sponsored by South Tyneside College

#### Financial Information

The Academy Trust currently consists of one school, Ridgeway Primary Academy, which has been an academy since February 1, 2013.

The Academy Trust has a financially supportive framework that allows the school to function on a day-to-day basis, yet ensures decisions are taken at the appropriate level and involves members and trustees, where appropriate, with significant financial decisions. This is enabled by a comprehensive set of financial regulations that define the duties of managers and budget holders in relation to finance matters, and ensures compliance with the Academies Financial Handbook.

The sponsor, South Tyneside College, provides finance support to the school, with procurement, transactional processing, payments, debt collection, management reporting, financial forecasting and budget setting. The sponsor also prepares the statutory accounts and deals with the audits and returns to EFA. All audit and regulatory reports have been unqualified and there have been no issues with returns to EFA, which highlights the outstanding financial management of the trust.

The Academy Trust aims to realise its vision while maintaining the financial framework described above which will be enhanced to accommodate additional schools and will enable all schools to benefit from the increased purchasing power and economies of scale a larger academy can have, as well as using the college's purchasing power, where appropriate to reduce costs.

Financial performance for the year ending August 31, 2017, is expected to be:

Income	Forecast Income 31/08/2017
Total Income	£1,544,387
Total Pay	£1,018,266
Total Non Pay	£442,780
Operating Surplus	£83,341
Transfer to Fixed Asset Fund	£24,153
Total Surplus	£59,188

**ANNEX C**

# **Our Proposed New Academies**

## ANNEX D

### Growth Plan

South Tyneside and the wider conurbation is presented with significant opportunities in the years ahead. As a region, we must take on the challenge of filling our skills gap and growing our thriving sectors, and we must continue to regenerate and redevelop those areas that can best attract new investment, industry and jobs. We must also be mindful that there are still areas of our region which need support – where high unemployment and low levels of skills and aspiration remain. South Tyneside Academy Trust plays a vital role in South Tyneside and the wider region's future prosperity, but with past and potential future cuts in funding for schools and academies, we must think more innovatively to make our resources and influence go further. The Government's expectations of the Academies sector have also evolved. An emphasis on the delivery of apprenticeships and higher level technical qualifications means that the MAT must work much more closely with local businesses and employer bodies to ensure we are fully responsive to changing needs and skills gaps.

It is also widely acknowledged that Tyneside has insufficient numbers of appropriately qualified residents with the required core skills to meet the emerging needs of our regional economy. We believe that South Tyneside Academy Trust is the best provider to meet these challenges, being more resilient, efficient and better able to provide a more coherent and high-quality offer. Our guiding principle throughout our planning is whether what we do will enhance opportunities for our local students. As an expanded, high-quality and financially robust MAT we will develop specialisms in each academy and better facilitate the development of higher level skills provision, apprenticeships and Further Education and Higher Education opportunities. We will engage with employers and ensure that students are ready for the job opportunities of the future.

### OUR GROWTH PRINCIPLES

- We will develop our curriculum model to support the emerging political devolution landscape and the sub-regional approach to the commissioning of skills;
- The sponsor college campuses have very strong engineering and advanced manufacturing provision which is well aligned to the SMART specialisation themes for the North East LEP and the emerging Northern Powerhouse priorities, as well as the new International Advanced Manufacturing Park – we will develop the academy curriculum to support opportunities in these key sectors;
- We will have a strengthened, long-term, local presence in North and South Tyneside, Newcastle and Sunderland serving the skills and educational needs of our local communities, supporting local economic development and enhancing community cohesion;
- We will have provision that is outstanding and innovative;
- We will develop a three year curriculum plan with a focus on growth opportunities and innovation in the curriculum to ensure continued development of education in the region, opening new route ways to skills for our students;
- We will develop a dynamic curriculum strategy that is well connected to the needs of our employers and serving our regionally recognised STEM specialisms particularly digital innovation, manufacturing and engineering and our internationally recognised specialism in maritime training;
- We will be financially outstanding with focused capital investment creating opportunities to grow and develop new provision for the future;
- We will deliver efficiency, outstanding quality and financial resilience through exceptional leadership and management.

## OUR GROWTH PRINCIPLES

---

### Profile of School Targets in the MAT

	2016/2017 Targets	2017/2018 Targets	2018/2019 Targets	2019/2020 Targets	2020/2021 Targets	2021/2022 Targets
Primary South Tyneside	1	1	1	2	3	3
Primary North Tyneside				1	3	3
Primary Newcastle				1	2	3
Secondary South Tyneside		1	1	1	2	2
Secondary North Tyneside				1	1	2
Secondary Newcastle		1	2	2	2	2

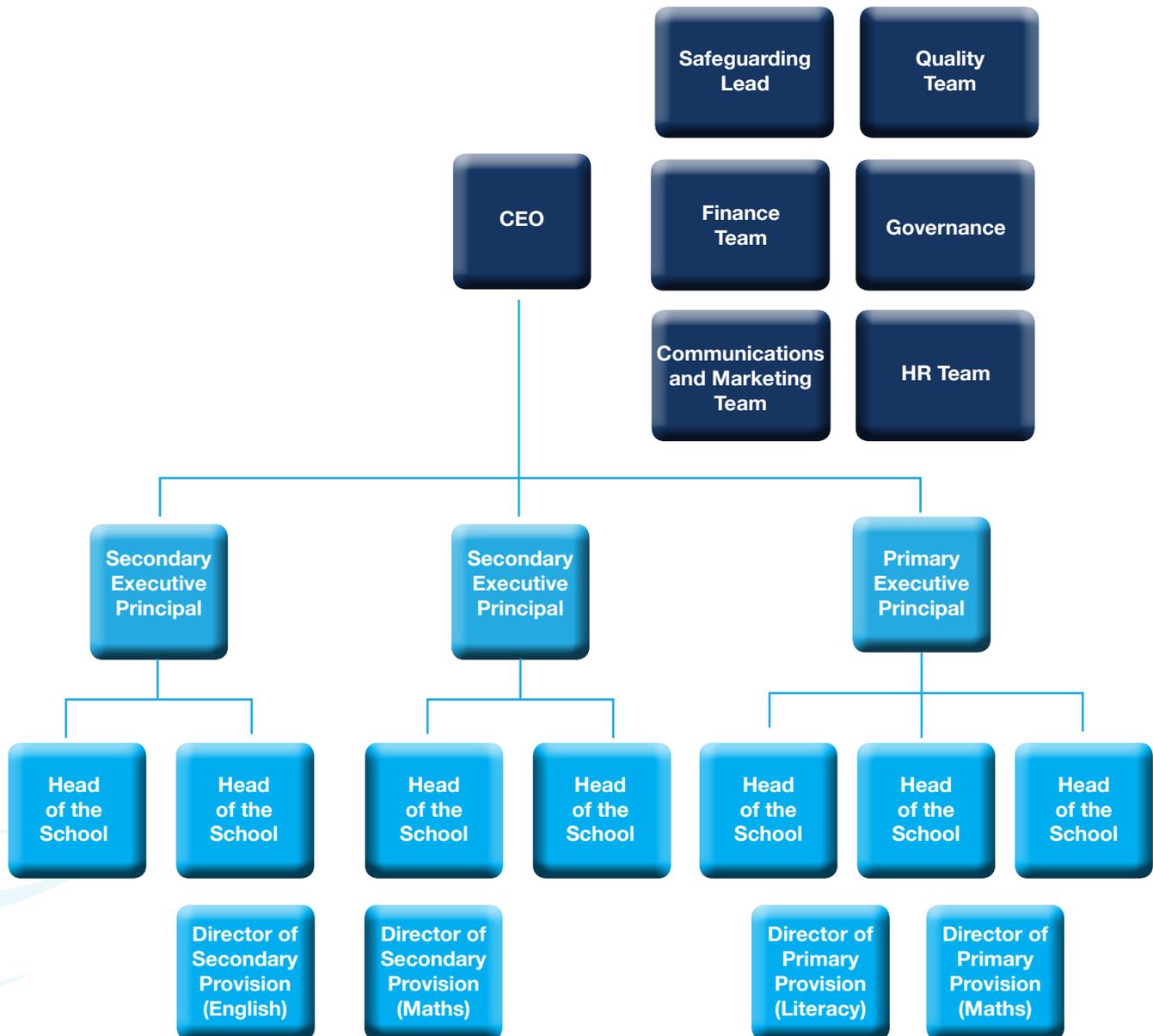
### DRAFT ACADEMY TRUST EXECUTIVE STRUCTURE

The Academy Trust Executive Structure will be developed in line with the MAT Growth Plan and a draft structure is outlined on page 52.

# DRAFT ACADEMY TRUST EXECUTIVE STRUCTURE

## Future Executive Structure – Supporting MAT Growth

- Directors of Provision would report to Primary/Secondary Executive Principals.
- Financial team and Governance/Human Resources team report to CEO.



As a group structure, the MAT will be led by the current CEO, and will include Secondary and Primary Executive Principals supported by the key MAT roles of Chief Operating Officer, Head of HR, Head of Performance, Head of Safeguarding and SEN. An Executive Principals Group will drive forward school to school support, performance improvement and teaching and learning. The executive capacity of the Trust will be developed alongside the growth of the MAT to ensure sufficient executive support is in place to drive forward performance.



SOUTH TYNESIDE  
ACADEMY TRUST