



Application form for transferring an academy to another trust

For trusts organising the transfer of an academy from its current trust ('the outgoing trust') to another trust ('the incoming trust').

This form is for

- Single academy trusts (SAT) that want to add other maintained schools or academies by using their existing legal entity, and becoming a new multi-academy trust (MAT)
- MATs wanting to add an academy or academies from SATs
- MATs wanting to add an academy or academies from a different MAT
- MATs merging/consolidating, where all the academies from one trust/s are transferring to another trust

Do not use this form for

- SATs or MATs wishing to add a **new** free school to their trust. A [free school application](#) must be completed.
- MATs wishing to add schools that are applying to become academies. The MAT needs to direct the schools to the [Apply to become an academy](#) service. The schools may require additional information from the trust to complete their application.
- MATs wishing to merge/consolidate to form a new MAT. Please discuss any plans with your named contact in the Department for Education (DfE) Regions Group.
- Groups of maintained schools forming a new MAT. **The lead school** should use the [Apply to become an academy](#) service. Further information can be found in the [Convert to an academy: guide for schools](#).
- If you have already provided some information to the DfE, please speak to your DfE delivery officer or named contact before completing this form.

How to submit your form

The "incoming" trust should submit the completed form to their DfE named contact if they already have one or to the appropriate [Regional Director's office](#).

Guidance

All plans to grow an academy trust must be agreed by DfE.

[Multi-academy trusts: establishing and developing your trust](#) is a useful guide.

[Commissioning high-quality trusts](#) explains how Regions Group takes decisions about the creation, consolidation and growth of academy trusts, including how the governance pillar of a strong trust is assessed.

If you are an existing SAT or MAT that wants to add academies from another SAT or MAT, please read [Academy transfers: information for academy trusts](#).

To ensure compliance of your governance arrangements please read the [Part 1 of the Academy trust handbook](#) and [Academy trust governance guide](#). These two documents set out what you need to know about the legal requirements, the five pillars of academy trust quality and resources from third parties. They also provide advice on the governance structure for the trust and their academies.

DfE decision required before a trust makes any changes

Before making any changes to the articles of association or any other trust documents that will be affected by this application, approval in writing must be obtained from Regions Group.

Academy transfers are decided based upon the details provided in the existing funding agreement. Where current provision differs from the funding agreement, written approval must be sought from the DfE using the [making a significant change process](#), for example differences in capacity, age range or nursery/resource provision. If this applies to your application, please discuss next steps with your DfE named contact.

You will also need to consider appointing a solicitor to advise on the changes required to your trust documents and on any other legal, charity or statutory requirements that may apply, e.g. Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE) or the Equality Act 2010. As public bodies, academy trusts should also consider whether they need to consult on their proposed changes. In all cases, it is good practice for trusts to inform parents, staff and other interested parties about their plans, and give them the opportunity to respond.

Application Form

Section 1 – Multi-academy trust (MAT) details

1.1 Details of proposal or proposed changes

The “incoming” trust should complete this form with additional information supplied by the transferring academy, academies or outgoing trust.

Type of application (delete as appropriate)	MATs merging/consolidating, where all the academies from one “outgoing” trust or trusts are transferring to another “incoming” trust
Proposed opening or transfer date (if more than one date please provide an explanation)	Academic Year 2026/27
Name of academy trust proposing the change (the incoming MAT)	Learning Partners Academy Trust
Companies House number of incoming trust	08303773
Current trust type of applicant (incoming trust)	Multi academy trust (delete as appropriate)
Name of proposed incoming MAT (state if unchanged or not yet decided)	unchanged
Name of the SAT or MAT that will close (if applicable) including Companies House numbers	Learning Partners Church Academy Trust 08765738 Enlighten Learning Trust 08812257
Name of Accounting Officer¹ (include email address and contact number)	Jack Mayhew jmayhew@learningpartners.org [REDACTED]
Name of Chief Financial Officer (include email address and contact number)	[REDACTED]
Name of Chair of Trustees for the incoming trust (include email address and contact number)	[REDACTED]

¹ For clarification, please see the [Academy trust handbook](#).

1.2 Details of all the proposed academies and schools that will transfer to the MAT if the changes are approved

Academy name(s)	Unique reference number (URN) see GIAS	Date originally opened	Does the funding agreement accurately reflect current provision? Yes/No ²
Pyrford CofE Primary School	140929	01/06/14	
Horsell CofE Junior School	151668	01/09/25	Yes
Farncombe CofE Infant School	151963	01/09/25	Yes
St Lawrence CofE Primary School	151964	01/10/25	Yes
Esher CofE High School	140650	01/03/14	No
St Andrew's CofE Primary School	143626	01/04/17	No
St Martin's CofE Junior School	149003	01/04/22	Yes
St Martin's CofE Infant School	149004	01/04/22	Yes
The Priory CofE School	149318	01/05/24	
St Nicolas' CofE Infant School	151817	01/10/25	Yes
Southborough High School	137917	01/03/12	Yes

Details of any discrepancy with the funding agreements of any academy

Several of the SFAs are on pre 2018 DfE models and NOR appear not to be accurate

Maintained School name(s)	Unique reference number (URN) see GIAS	Date planning to open as an academy	Has the Apply to become an academy service been completed ? Yes/No
			
St Marys CofE Controlled Primary	125150	01/04/26	Yes

1.3 If required, has Diocesan consent been provided for this application?

Yes (please attach)

² If No, please specify the nature of the discrepancy and if a [Making a Significant Change application](#) has been made

1.4 Contact details for use by the delivery officer in DfE Regions Group

Incoming trust – Lead applicant	
Contact name	
Your role within the organisation	
Contact number	
Email address	

Outgoing trust	Learning Partners Church Academy Trust
Contact name	
Your role within the organisation	
Contact number	
Email address	info@pyrford.surrey.sch.uk
Outgoing trust	Enlighten Learning Trust
Contact name	
Your role within the organisation	
Contact number	
Email address	

Section 2 – Rationale, Benefits, Risks and Mitigations

2.1 Summary of the rationale for the change, benefits, risks and mitigations of the proposed changes.

The summary should include the impact for the pupils, local area, academies/schools and trust, using the framework and five pillars as set out in the [Commissioning high-quality trusts guidance](#). Prompts have been provided to support the assessment Regions Group will undertake when reaching a decision.

Why are you proposing this academy or academies to transfer? Provide a summary of the strategic need of the academy, local area (and diocesan plans if applicable), and how the academy will contribute to maintaining and improving schools already in the trust.

This proposal brings together three multi-academy trusts – Learning Partners Church Academy Trust, Enlighten Learning Trust and Learning Partners Academy Trust – into a

single, stronger, values-driven trust for church and community schools serving pupils aged 4–18.

We believe that by merging our three trusts we will deepen collaboration to elevate learning for all our children, we can further develop staff expertise and leadership, we will realise our potential to be civic anchors in our communities and underpin this with effective and efficient system organisation. School improvement will underpin the merged trust's ambition, while synergies will ensure schools are able to address the challenges facing the sector and capitalise on opportunities together. We will be a new MAT of church and community schools, one of the first of its kind, respecting and honouring the distinctiveness of both schools' heritage, and creating opportunities for mutual learning and support.

This is encapsulated in our shared vision: "Better together; we are a committed partnership of schools which enables every learner to thrive". Both Learning Partners Church Academy Trust (LPCAT) and Enlighten Learning Trust (ELT) are relatively small Church of England multi academy trusts; the Executive Team at Learning Partners Academy Trust have been collaboratively with both Trusts for almost two years and Jack Mayhew, CEO of LPAT, has recently been appointed as CEO at LPCAT. Jack brings extensive experience in leading trust mergers and organisational growth, having successfully unified Athena Schools Trust and Guildford Education Partnership (GEP) into a larger Multi Academy Trust. His strategic leadership, continuity, and proven expertise in overseeing complex integration and expansion processes make him well suited for the role of CEO in a large Multi Academy Trust.

Both trusts will benefit from being part of a larger, strong and established Trust with a track record of school improvement and education excellence for all pupils. Delivering on our strategic aims: "Excellence, Equity, Everyone"

Jack's leadership will be key to maintaining educational excellence and unlocking the benefits of merger consolidation, including economies of scale, enhanced professional development, and strengthened school improvement capacity.

Senior Leaders from all three Trusts have been working closely with Alex Tear, Director of Education at the Diocese of Guildford, to ensure the strategic vision of the Diocese Board of Education is adhered to. We work collaboratively to be a high-performing and inclusive Trust where all achieve.

The merged trust will be a leading light in educational delivery, with a clear ambition to grow and develop leaders across its church and community schools. We are committed to innovative plans that ensure every child thrives, building on our shared values of Ambition, Better Together, Transformational Learning, Brave Innovators and Service.

Our vision is: "Better together; we are a committed partnership of schools which enables every learner to thrive."

Our mission is: "To be a high-performing and inclusive Trust where all achieve."

Why is this incoming trust the right trust for this academy or academies to transfer?

Provide a summary of the strategic needs of the trust and how the trust can support the developmental needs of the academy being transferred.

This merger builds on the successful joint working under the existing education focused SLA's, allowing all three trusts to build a sustainable and enhanced high-quality education across their combined schools through integrated governance and shared resources.

Merging will create a larger, more diverse trust, support greater collaboration and sharing of best practice across schools and phases. Pupils will benefit from increased access to specialist teaching, enhanced curriculum development, and broader enrichment opportunities. The established SLA demonstrates the commitment and capability to drive school improvement collaboratively, improving educational outcomes and staff professional development.

The combined capacity also strengthens support for SEND and inclusion, ensuring that every pupil can access the tailored support they need to thrive. Staff benefit from wider opportunities for professional development and skill-sharing, allowing expertise in specialist areas to be transferred across schools so that all pupils, regardless of background or ability, benefit from enriched teaching and learning. Ultimately, the merger creates a culture of collaboration and innovation that drives excellence across the entire educational journey.

Learning Partners Academy Trust is already a leading light in educational delivery, with a proven track record of school improvement, strong governance and innovative practice.

As a merged trust for church and community schools, we are exploring new opportunities to:

- Deliver a coherent, high-quality education for pupils aged 4–18.
- Grow and develop leaders at all levels across our schools.
- Share best practice and resources to strengthen teaching and learning in every school.
- Raise standards and outcomes for every child, ensuring successful schools in every community.

This ambition is underpinned by our values: Ambition, Better Together, Transformational Learning, Brave Innovators and Service, and our ethos of being Inclusive, Distinctive, Collaborative, Joyful and Discovery-driven.

LPAT has engaged external specialists to support transparent due diligence across the three trusts. [REDACTED] has been engaged to facilitate this process, bringing independent expertise to scrutinise financial, educational, and operational areas.

Additionally, [REDACTED] has been brought into challenge, support and scrutinise the

hub model implementation that will support the merged trust's operational structure. These external partnerships demonstrate the trust's commitment to rigorous, independent assessment and robust governance.

List the expected benefits for the transferring academy or academies

The merged entity will achieve greater economies of scale, optimising procurement, central services, and budget deployment across a broader portfolio of schools. Enhanced financial oversight and planning at group level will ensure sustainable investment in front-line teaching and school environments. Larger trust capacity supports resilience against funding fluctuations and economic pressures.

All three Trusts work in close partnership with the Diocese of Guildford to ensure that the church schools they work with are well supported with all aspects of Christian distinctiveness. Church schools engage with the Diocese for SIAMs support and training. This working relationship will continue with the merged trust to ensure the Christian characteristics of the schools are retained.

Staff will benefit from larger peer networks, professional pathways, and access to trust-wide initiatives such as training and development.

List the expected benefits for the incoming trust

It is anticipated that there will be regional expertise in the geographical area which the merged trust will serve. Educational Directors will be working across smaller groupings of schools to negotiate bespoke support and challenge which will ultimately provide stronger educational outcomes for pupils. There will be a clear pathway in communities for education from 2-18 years providing parental confidence in the education system. Trust wide systems and process will support the education journey.

The outgoing trusts have demonstrated substantial capability and success that will support the ongoing development of the incoming trust particularly in school leadership, inspection and operational expertise.

The robustness in the systems and process will give greater trust capacity to support a wider regional educational system of school improvement with the trust then gaining capacity to support schools beyond just those in Learning Partners.

What risks do you foresee and what mitigations are planned? For example, relating to falling/low educational standards, falling pupil numbers, financial deficits, leadership changes

What evidence is there of this academy or academies working with the incoming trust?

LPAT have established education partnerships with both LPCAT and ELT, confirmed through an SLA formally agreed and enacted in September 2025. This merger is a natural extension of the current SLA model, formalising collaboration into a single legal and operational structure for greater efficiency, impact, and sustainability.

At leadership level we have worked collaboratively to ensure our operational, executive leadership and education teams are culturally aligned.

Extensive subject and specialist support networks have been established across the proposed merged trust giving educational staff shared expertise. Headteachers are supported in all schools through a trust school improvement framework where there are regular touch base meetings, robust performance management and strong school improvement and accountability systems in place. Collectively, trust and local priorities are driven.

Where pupil numbers in the transferring academy or academies are forecast to drop below 85% of the school capacity, please provide a three-year forecast of pupil numbers and your plans to mitigate this. Please state if not applicable

While producing accurate three-year pupil forecasts is challenging, the Trust has reviewed projections provided by the Local Authority (LA) and examined local contextual data.

[REDACTED]

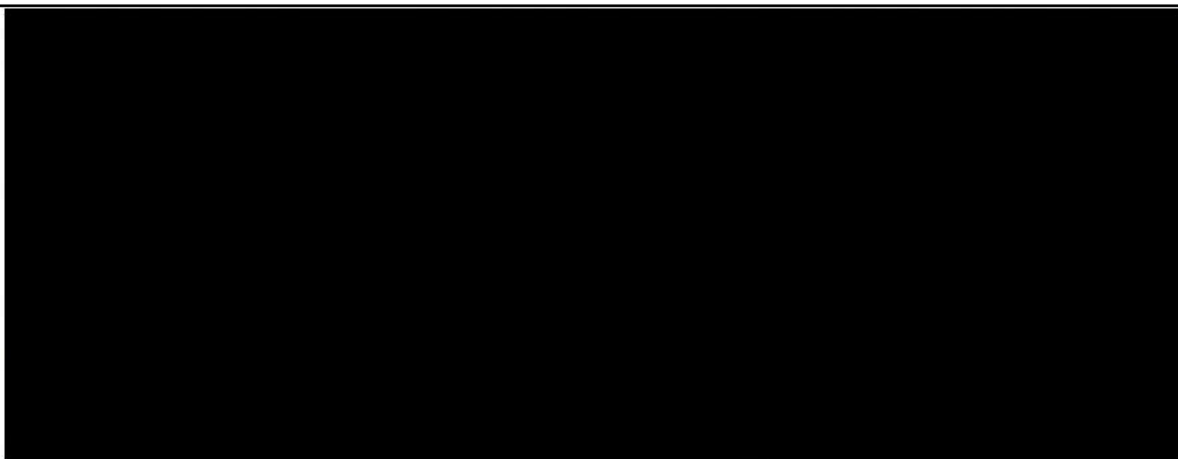
Secondary School Mitigation

[REDACTED]

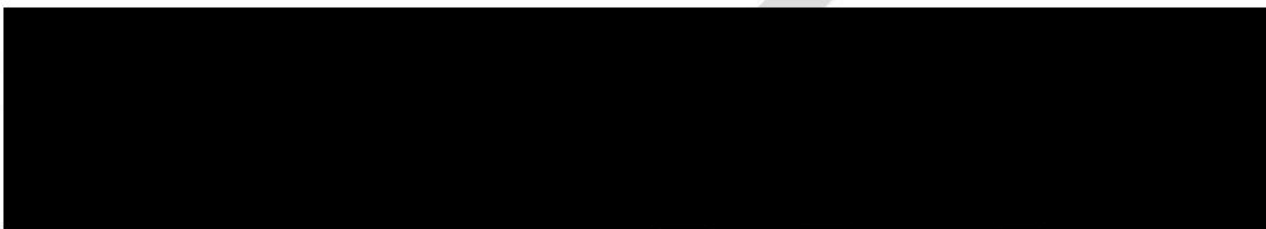
Primary Schools Mitigation

[REDACTED]

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Infant School Mitigation



What level of due diligence has the incoming trust carried out on the transferring academy or academies

LPAT has been strategically working with both Trusts for a significant time and therefore has a good understanding of the educational standards in each Trust. The Trustees of LPAT have employed the services of an independent third party to complete a detailed due diligence exercise in the following areas:-

Financial Health and Viability - In-depth audit including pay, pensions, liabilities, taxes, and compliance

Education - Review of pupil data, school performance, school improvement, and CPD

Governance and Leadership - Review of structure, conflicts, committees, policies and board papers

Estates (inc. legal & property) - Review of assets, estates, maintenance, capital works

Safeguarding and Compliance - Review of safeguarding issues and audit

Culture and Organisational Fit - Cultural review and fit analysis

Risk Identification and Mitigation - Detailed overview of metrics relating to complaints, lawsuit disclosure, settlements, staffing

Operations (inc. Shared services, IT Business Systems & Processes) - Full operational audit: systems integration, procurement, IT infrastructure, CCR, and central team planning

The resulting report was presented to Trustees at Board meeting on 18th December 2025.

For any academy or academies transferring with an in-year or overall deficit, please provide a three-year financial forecast for the academy and your plans to bring the academy into surplus. Please state if not applicable

While we have not yet been able to review in detail the accounts for both incoming trusts, we anticipate that one or both trusts will transfer in with an in-year (but not overall) deficit.

We will conduct an ICFP review of the incoming schools, seeking to identify measures that will allow us to return each school to a surplus position. Measures are likely to include changes to staffing levels, teaching allocations and procurement efficiencies.

Reserve funds within the incoming trusts will provide a buffer to allow this review and associated changes to be phased in over a medium-term timeframe.

If the transferring academy or academies finances are currently pooled, what is the associated allocation of reserves and funding that will transfer? Please state if not applicable

N/A 100% of the finances will transfer.

Summarise any other financial risks associated with this application, for example relating to loans, leases, financial investigations, major capital projects planned for the transferring academy

The due diligence picture is mixed. It is mixed in level of detail and mixed in the picture the information presents.

LPCAT is a very newly formed trust, we have limited information on the trust as a whole and have had to rely on information of the individual schools. While this information picture is thin, the schools are generally in reasonable health, and I believe we are comfortable proceeding to the merger with LPCAT. Being the joint CEO, sharing Educational Improvement teams and having two trustees on both boards reduces the level of risk (despite unknown areas) and I hope trustees concur.

ELT presents a more complete data picture, but perhaps more areas of possible concern. The trust has a challenging pupil number picture and will require significant reorganisation and adjustment. Despite being a formed trust for some time, there are areas of operation where trust maturity hasn't been reached, and our onboarding processes will be significant and perhaps cultural. As [REDACTED] has outlined, merging with LPCAT & ELT does adjust our balance to smaller schools and this presents capacity and resource challenges. The hub model is designed to address these.

Despite these concerns, I am still personally of the opinion that we can and should submit the MAT merger form to the DfE on our original timelines and am seeking trustee approval today at the meeting. The opportunity these mergers present to deliver on our

moral purpose and bring communities of schools together against a challenging national backdrop offers great benefits and remains a uniting vision which trustees have supported for a number of years now.

2.2 Additional information to support your application

Only provide information that is **directly relevant** to this application.

High Quality and Inclusive Education

How does the incoming trust currently deliver a high quality and inclusive education and how will any transferring academy be impacted or impact the incoming trust. For example, details of the experience and outcomes the incoming trust has with pupils of similar characteristics to those of the transferring academy.

Current evidence of high quality and inclusive education at the schools of the incoming trust

The trust's approach to growth and school improvement is aligned with the Department for Education's five pillars of trust quality: high quality and inclusive education, school improvement, workforce, finance and operations, and governance and leadership.

As such, LPAT are committed to ensuring every student has access to an education that enables them to thrive. Demonstrating our value 'Ambition for all', the Trust proudly supported Guildford County School's bid to open a new specialist unit for students with Autism Spectrum Disorder (ASD). This unit supports students who face challenges in a mainstream setting while enabling access to mainstream education where possible.

Alongside the Trust's commitment to inclusivity, they are also proud of the academic success of their schools. At the end of 2024 the overall Progress 8 score stood at +0.38, significantly above the national average of -0.03. This means that, on average, LPAT students achieve up to half a grade higher per subject compared to similar pupils across the country. Two of LPAT schools received national recognition for their exceptional progress, Kings College Guildford was the highest climber in the region in the Fairer Schools Index moving up 1,410 places, while Glebelands in Cranleigh were ranked as the 15th most improved school in the country for Progress 8.

Since the formation of Learning Partners Academy Trust, 14 of the schools have been inspected by Ofsted. 100% of schools have attained a good or outstanding grading with two schools moving from RI to Good and others retaining outstanding status.

Learning Partners secondary schools with KS5 provision have shown an increased trajectory for the last 3 years. Value added scores have risen from -0.38 to 0.41. Average points have risen to 36.8 across the trust.

At KS2 there has also been an upward trend in achievement with APS in reading at KS2 rising from 102 to 107.

In 2025, all 8 Learning Partners Primary and Infant schools achieved over the 80% threshold for phonics. This is a significant improvement

As a leading light in educational delivery, we are committed to innovative plans that ensure every child, regardless of background or ability, can access a broad, inspiring and challenging curriculum.

We are exploring opportunities to strengthen our offer for pupils aged 4–18 across our church and community schools, including enhanced enrichment, specialist teaching and transition pathways.

Our vision – “Better together; we are a committed partnership of schools which enables every learner to thrive” – is at the heart of our inclusive and ambitious approach.

Attendance has also improved over the last 3 years across the trust. Primary attendance in 2024-2025 was 95.4% (1.4% above national) and secondary attendance was 92.5% (1.1% above national)

The Department for Education asked Learning Partners Academy Trust to strengthen primary school expertise on the Board; in response, [REDACTED] has joined the trust and is actively supporting teams across schools in this capacity.

Expected impact on the incoming school/s or incoming trust

Despite one-word judgments no longer being applicable, LPAT and ELT have a proven track record of school improvement and it is anticipated that all schools in the merged trust will have bespoke school improvement support to ensure high academic standards and outcomes. LPCAT and ELT have very similar values and for the schools within ELT to be joining a larger Trust the breadth of support and collaboration will increase whilst insulating them from future challenges.

Extensive subject and specialist support networks have been established across the proposed merged trust giving staff shared expertise. Headteachers are supported in all schools through a trust school improvement framework where there are regular touch base meetings, robust performance management and strong school improvement and accountability systems in place.

School Improvement

Describe any planned changes to the trust's current approach to school improvement. For example, use of school improvement leadership from the transferring academy or evidence showing how the trust has improved similar academies.

Your proposed school improvement model and how it will be delivered

School improvement is led by a qualified team of School Improvement Partners (SIPs) comprising serving and former CEOs and previous headteachers with experience at both local and national trust level. This team provides regular challenge and support, targeted reviews and bespoke improvement planning, ensuring rapid and sustainable impact for schools joining the trust

All schools within the Trust are offered the following school improvement package :-

- School data analysis undertaken by School Improvement Partner
- Headteacher Performance Management target setting and review meetings
- SEF/SDP templates and appropriateness review
- Full access to all LPAT CPLD programme (including Inset)
- All network meetings (SEND, curriculum subjects, DHT/AHT, DSL, HSLW)
- Writing moderation
- Curriculum policy and framework
- Informal peer to peer collaboration facilitation
- HT Meetings
- Trust mandated policy documentation
- School data analysis
- Inclusion Framework
- HT residential conference
- SEF/SDP templates and appropriateness review
- Personalised curriculum support
- Inclusion support visits
- Curriculum framework and templates
- Bespoke Ofsted support from serving Inspectors
- Bespoke staff Inset training/staff meetings
- All network meetings (SEND, curriculum subjects, DHT/AHT, DSL, HSLW)
- Writing moderation
- Access to shared hub portal (CPD)
- Informal peer to peer collaboration facilitation
- Trust mandated policy documentation
- Safeguarding Compliance/ Training visit by the Trust with SBM and Safeguarding Governor
- SCR Compliance/ Training visit by the Trust with SBM and Safeguarding Governor
- Allotted time with School Improvement Partner (SIP)

Kings College school has been on a school improvement journey, graded as 'Inadequate' by Ofsted in 2016, it became a sponsored academy. It subsequently attained a 'Good' in 2018, this improvement has been sustained, and it retained a 'Good' grading in 2024. The reputation of the school has gone from strength to strength.

Glebelands School joined Learning Partners in 2023. Having previously struggled to attain outcomes around national levels at KS4, since joining the trust it has been named as a top 20 most improved school in the country for improved outcomes in 2024.

Loseley Fields Primary School was deemed as 'Requiring Improvement' by Ofsted in 2018, since joining Learning Partners, the school has been reinspected and attained a 'Good' with significant areas of Outstanding in its most recent Ofsted in 2022. Outcomes continue to improve at this school which has significantly improved pupil numbers.

Both Boxgrove Primary School and Geroage Abbot School were inspected in 2025. Both schools were identified as having made significant progress and were recommended to be reinspected with a view towards an overall judgment of 'Outstanding' outcomes at these schools remain very strong for all groups of children.

Burpham Primary School joined Learning Partners in 2023. It was subsequently reinspected as an academy and retained 'Outstanding' status in 2025. Outcomes at this school in July 2025 for KS2 pupils were exceptionally high.

We have a diverse family of schools that can collaborate effectively, for example our 16-18 Surrey Maths School and its outreach programme for Primary and Secondary Schools children.

Across LPAT, all schools inspected since the trust's formation have secured good or outstanding Ofsted outcomes, with several schools improving from requires improvement to good as a result of focused trust support.

Workforce

Describe any planned changes to utilise the central functions from the transferring academy or how you will incorporate the development of transferring staff into your existing plans

How do you develop and retain your workforce?

LPAT are currently undertaking significant change across its central functions. A hub model is currently being implemented and each hub will contain a group of schools geographically within North, West and South of the region. Each hub will have a dedicated team of central staff to support its core functions such as Finance, HR, Operations and Premises, Governance and School Improvement.

LPAT also provide high quality professional development for staff at all levels, through its conferences, the annual trust-wide INSET day and their CPLD programme. They facilitate professional networking groups for staff in a wide variety of roles, including headteachers, school business managers, mental health leads and administrators.

Coaching is available to all teaching and support staff, led by senior staff within the trust with master coaching qualifications.

LPAT is a successful recruiter with a strong reputation in the area despite significant regional workforce challenges.

The trust runs an active, structured CPD and CPLD programme, with a published calendar of events spanning leadership development, subject networks, safeguarding, SEND and teaching and learning. The Learning Partners Academy Trust calendar sets out regular CPLD events across the year, ensuring staff in all phases can access high-quality professional learning.

As a leading light in educational delivery, we are committed to growing and developing leaders across our church and community schools.

We are exploring opportunities to:

- Strengthen leadership pipelines from middle to senior leadership.
- Provide targeted development for governors, trustees and school leaders.
- Share expertise and best practice across our schools to grow a strong, collaborative leadership culture.

This is underpinned by our values of Ambition, Better Together and Service, and our mission to be a high-performing and inclusive Trust where all achieve.

“Steplab” is used as an active professional development tool across the trust, supporting instructional coaching, and the monitoring of professional development over time. This has been successfully embedded for several years in ELT, providing further evidence of the alignment of approaches and potential for building on shared expertise.

Finance and Operations

This section is about **the proposed trust’s approach** to financial planning. Any financial **risks associated with the academy** are to be included in the **Section 2. Risk**

Do you plan to change the incoming trust internal and external financial scrutiny and audit and financial governance arrangements? Please state if unchanged from current arrangements or describe the planned changes

Unchanged from current arrangements - We have an established internal scrutiny framework at Learning Partners Academy Trust (LPAT), which is overseen by our Audit & Risk Committee (trustee sub-committee). This includes an annual statutory audit, a robust internal audit / scrutiny workplan and regular review of financial risks as part of our overarching risk management framework. Our policies, procedures and governance structure ensures financial risk is effectively managed, appropriate scrutiny takes place via third party / independent and appropriately qualified parties, alongside scrutiny from our trustees, members of our audit and risk committee and third party auditors, who will

ensure the COO and Head of Finance is held to account (CFO responsibilities are undertaken with both the COO and Head of Finance roles).

How will the incoming trust finance its growth plans over the next 3 years? Please state if not applicable

We have a rolling budget and 3-year plan across the trust which sets out our expectations around funding and expenditure across all schools and the centre. These budgets are set using centrally prescribed budget assumptions and are scrutinised by our Resources Committee prior to approval. We have an agreed central service charge in place, which funds centrally run services. We also have a paid for associate model in place, that ensures any joining schools contribute to the costs incurred in onboarding new schools. We also have a reserves policy, which ensures sufficient funds are held to both mitigate against an element of risk and can be utilised to support any investment / development plans agreed by Trustees.

Summarise the (proposed) trust policy on charges made to its academies, including any % top-slice and outline which services are provided under this arrangement . Please state if unchanged from current mechanisms.



Trusts which include special and alternative provision academies should outline any agreement with a local authority or other bodies regarding the provision of high needs places funding and the likely continuing need for those places in the future. Please state if not applicable.

Pond Meadow Academy Trust, a single academy trust based in Guildford, is a Special Academy for pupils age 2 - 18 which will merge into LPAT on 01/06/26. The existing funding agreement with Guildford local authority will novate across to LPAT. The academy is oversubscribed and the anticipation is that this will continue as the type of SEN provision they provide (ASD) is in high demand.

Governance and Leadership

Leadership structure and delegation

Where balancing your trust budget is reliant on external (non-government) income, please provide evidence/assurance of a reasonable expectation that this will continue. Please state if not applicable

We have experienced, qualified finance staff responsible for developing budgets, reforecasting monthly and ensuring our financial management framework is effectively followed. Financial scrutiny takes place at school level, by the central finance team, by our Resources Committee (termly) and by our trustees. Central staff undertake termly financial reviews with school finance staff and headteachers to review financial budgets and performance. We effectively track forecasts, pupil numbers and cashflows and monitor income and expenditure (actuals v forecasts). We set and monitor financial KPI's and undertake financial benchmarking to ensure each school continues to be financially sustainable. Our trustees consider annually our going concern statement, as set out within our financial accounts and we evidence going concern as part of our annual statutory audit. Our risk management framework is key vehicle for tracking financial risk and ensuring it is effectively mitigated. Our growth strategy and robust due diligence framework undertaken for joining schools also helps further mitigate against financial risk.

Describe how the leadership structure will change as part of this academy transfer. Please state if unchanged

LPAT is currently a 17 school MAT led by a reactive, at capacity central team comprising a CEO, COO, Head of Finance, Head of HR, Director of IT, Head of Projects & Operational Strategy and Head of Operations and two Education Directors.

Over the period to 2026/27, the trust is working on:

- The implementation of a 3 hub service delivery model across Education, HR, Finance, IT, Procurement, Estates and Health & Safety.
- The proposal is for two further MATs to merge into LPAT, as well as two transferring SATs adding 13 schools in a single academic year to create a 30 school trust.

The trust recognises the required step change in its executive and senior leadership capacity to ensure safe, sustainable growth from 17 to 30 schools. This narrative sets out how the proposed C-suite and senior leadership structure post merger/ 2026/27 has been designed to meet DfE expectations for strong, sustainable governance and leadership, and to maintain and deliver educational and operational outcomes across a 3 hub model.

These changes represent a material increase in workload, complexity and risk, and will require robust strategic leadership, specialist expertise and operational capacity in line with DfE guidance on MAT growth and effective governance.

DfE guidance requires that boards must ensure they have an executive structure with the skills and capacity to lead a larger group of schools, maintain strong internal control, and protect children's entitlement to a good education during periods of growth. The Academy Trust Handbook and Governance Guide emphasise that the senior executive leader, supported by a suitably qualified chief financial officer and other senior leaders, must secure effective financial management, risk management, and educational standards across all academies. The proposed structure responds directly to these expectations by creating clear, board facing C-suite accountabilities for Education, Strategy, Operations, Finance and People; supported by hub-level leadership that enables effective management, oversight and assurance.

The trust will move from a school led operating model to a structured three-hub model. This shift reflects good practice for larger MATs, where central teams focus on strategy, standards, systems and compliant processes, and hubs provide specialised leadership and support close to schools. Hub leaders will operate within a common trust led framework of policies, systems and KPIs, while supporting the local day-to-day school specific management and needs.

Delivering a complex and effective merger of two MATs and a full operating model restructure in parallel requires focused and specific senior capacity for transformation and integration/ adoption. Noting business as usual leadership to ensure continuity and deliverability of services.

The transitional Deputy CEO role is intended to provide additional senior capacity during the transformation period to a 30+ school trust, with a focused remit across governance, educational standards, Christian distinctiveness and civic/community partnerships. They will work alongside the CEO, COO and Chief Education Officer to align governance frameworks and schemes of delegation, ensure aligned delivery across the three hubs, and a shared collaborative ethos. During the transitory period, the Deputy CEO will assist in the structural engagement for the core executive team to build capacity and accountability once the incoming merged trust has reached a stable operating state.

The introduction of a Chief Education Officer, supported by three Hub Directors of Education, Hub Heads of SEND and Safeguarding, and a Head of Christian Distinctiveness, creates a collaborative school improvement and inclusion framework for a 30+ school trust. This provides clear direction from the board and CEO for required service delivery in every school, and ensures the relevant specialists are available to meet pupil needs, comply with statutory safeguarding duties and maintain the Christian character of church schools joining the merged trust.

Maintaining the established Chief Operations Officer role and establishing a Directors of Operations and IT supported by newly installed hub heads of Estates and IT will provide the capacity to standardise and ensure health and safety, estates compliance, IT resilience across 30 schools. Creating a Chief Finance Officer and Director of Finance, together with hub heads of Finance, ensures the trust can meet DfE expectations for strong financial management and accuracy and reporting for a larger and more complex

model. The Chief People Officer, Director of HR, Head of Talent Development, Payroll Manager and hub heads of HR will lead a trust wide people strategy covering workforce planning, recruitment and retention, employee relations, and professional development, for sustainability and to manage the implications of a significant growth program.

The projects and strategy function through a Director of Strategy and Procurement Manager will provide structured programme management and cost efficient trust wide compliance, across all operational services by coordinating planning and having oversight across all workstreams. This ensures that the education, finance, HR and estates functions remain focused on maintaining standards and compliance, while the Strategy team specialise in coordinating due diligence, business systems and processes, risk awareness and stakeholder engagement across the three hubs.

The expanded executive team and hub structure are designed to give the board clearer lines of reporting and more robust, evidence driven assurance over critical decisions. Working with the Deputy CEO, a dedicated Governance Lead will support trustees and local governance committees with policy, training, skills development, and a strengthened clerking structure operating consistently across all hubs, including a clear framework for high quality clerking and a programme of LGB training requirements. The overall design aligns with the MAT Assurance Framework, enabling the board to evidence that it has the leadership capacity, systems, controls and local governance support required to take on additional schools without detriment to existing pupils.

The proposed C-suite and Senior Leadership structure moves the trust from a stretched and reactive capacity model capable of running a small to medium MAT to a robust hub structure able to support a significantly larger, 30+ school organisation undertaking major strategic change.

It provides the additional senior capacity, specialist expertise and necessary accountability required to deliver exceptional educational standards, financial integrity, statutory compliance (procurement, H&S, HR, etc.) and Christian distinctiveness through merger process and into business as usual for the incoming trust.

Whilst under review, it is suggested the model may be funded through a combination of planned efficiencies from the new hub operating model, economies of scale across 30 schools, and a phased reallocation of existing support service budgets.

LPAT will not create all leadership and hub roles immediately. The intention is to bring them in with a phased plan, following the agreed timetable for when the two incoming MATs and their schools have received DfE/RD approval to transfer into the trust.

The additionally generated GAG and other funding for the enlarged organisation will support each group of schools as they join, and the related hub posts for each relevant service area will then be created or uplifted (as appropriate), so the extra staffing cost will, broadly, rise in line with the extra income. The trust recognises that there may be a requirement to draw on trust/ school reserves, sensibly and with an evidence case, to

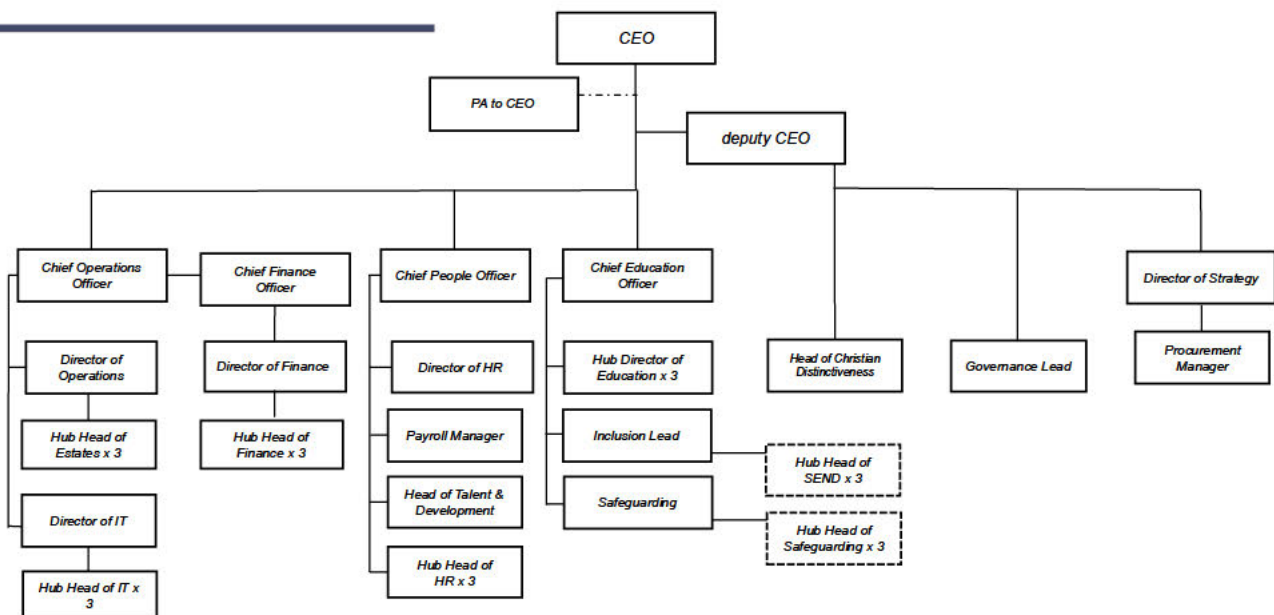
manage the short term transition and project bulge costs to support the successful delivery. This use of funds would be clearly planned and approved by trust board.

Indirect savings are intended to be made through consolidated/ centrally led procurement, managing a portfolio of estates assets, per hub, across merged trust, rather than school by school and streamlined systems and processes (particularly in HR, finance and IT), with an ongoing proportion of these efficiencies to support an expanded C-suite and senior leadership team.

The trust will also ensure that the central funding model remains transparent and affordable for schools, with regular review by the board and its finance committee to confirm that the structure remains sustainable, delivers value for money, and continues to meet DfE expectations for use of public funds.

Following approval, and once the incoming trust is aligned to aligned educational and operational delivery, the trust will establish a strong and experienced Central Leadership Team. This team will provide strategic direction and operational expertise to ensure the trust delivers innovation, sustainability, and excellence in education. The overarching goal is to secure the best possible outcomes for children and young people; through inclusive, high-quality learning experiences that enable every pupil to thrive.

Merged Structure 2026-27



List the benefits to the leadership of the academy and/or trust as a result of this academy transfer.

Formal integration streamlines governance, enabling the new trust to align vision, ethos, and strategy with a united board and leadership structure. This will support robust accountability, risk management, and compliant operations, all underpinned by strong central scrutiny and internal control. Trust leadership will have the expertise and resource to provide highly effective support to all academies, while local governance ensures that community and school-level priorities remain central.

Mike Boddington, current CEO at ELT, would join the LPAT executive team with an extensive school leadership track record in Surrey and London as well as diocesan and Ofsted links and experience.

Staff will benefit from larger peer networks, professional pathways, and access to trust-wide initiatives. The restructured trust can offer broader partnerships with the Diocese and community, strengthening its educational offer and reputation locally and beyond

Additional Information:

A local governance review is underway to ensure governance arrangements remain proportionate, effective and aligned with DfE trust quality expectations. The proposed model is a flat local governance structure with no sub-committees; Local Governing bodies will meet six times per year with a clear scheme of delegation, enabling focused discussion on pupil outcomes, safeguarding and community engagement.

Who are/will be the members of the MAT?

Members – have ultimate responsibility for the trust achieving its charitable objectives. They agree the articles of association and have powers to appoint and remove the trustees. Every trust **must** have at least three members but should have five or more³.

Name of member The Academy Trust must have at least 3 members but should have 5 or more. Members must not be employees of the trust ²	New or existing member?	Current responsibilities - employment/self-employment/ other non-exec roles, and how these demonstrate expertise/skills required for role as member Include the names of any schools, academy trusts or other educational institutions (with dates of employment if appropriate) in the past five years.	Previous roles/posts (exec or non-exec) within other organisations and how these demonstrate expertise/skills required for the role as a member Include the names of any schools, academy trusts or other educational institutions (with dates of employment if appropriate) in the past five years.	Is it intended for this member to also be a trustee or part of a local governing board or academy council? The majority of members should not also be trustees ³
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED] [REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]	No
[REDACTED]	[REDACTED]	[REDACTED] [REDACTED]	[REDACTED]	[REDACTED]

³ See [Part 1. Roles and responsibilities Academy trust handbook 2024](#) for requirements about the number of members.

Name any existing members of the SAT becoming a MAT or the MAT expanding that is being replaced

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Who are/will be the trustees?

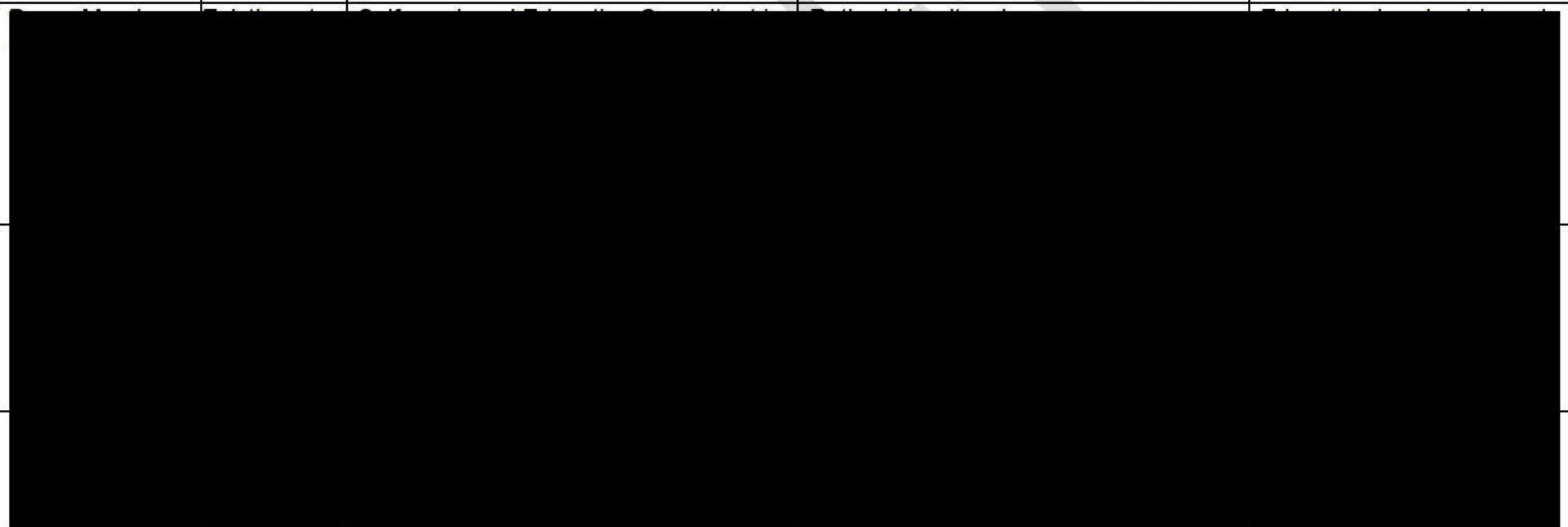
Trustees – are collectively known as the board of trustees providing strategic leadership, ensuring accountability and assurance that there is compliance with regulatory, contractual and statutory requirements and engagement with stakeholders as set out in the Academy trust handbook.⁴ Consideration must also be given to conflicts of interest.⁵

The trustees must ensure compliance with:

- company and charity law,
- the trust's funding agreement with the Secretary of State
- the trusts own articles of association.

It is essential that the trustees have the right skills, knowledge and experience to undertake these functions. All trusts should have at least two places for parents, carers or other individuals with parental responsibilities in their governance structure. These places are either at board level or two places on each local governing body⁴.

⁴ See [Part 1. Roles and responsibilities Academy trust handbook 2024](#) for requirements about the trustees and stakeholder engagement.

Name of trustee⁵ If also a member, details should be in this section and the member section.	New or existing trustee?	Current responsibilities - employment/ self-employment/other non-exec roles and how these demonstrate expertise/skills required for role as trustee. Include details of involvement on other academy trust boards or governing bodies (if applicable) in the past five years.	Previous roles/posts – (exec or non-exec) within other organisations and how these demonstrate expertise/skills required for the role as a trustee. Include the names of any schools, academy trusts or other educational institutions (with dates of employment if appropriate) in the past five years.	Proposed role and responsibility on the board of trustees and the skills/experience they bring to the board e.g. Chair or Chair of a committee, senior executive leader (if applicable), parent.
				

⁵ If a trustee will also be on any Local Governing Body at the same trust, please note 'LGB' against their name in this column.



Please attach an A4 diagram showing your proposed multi-academy trust governance structure.

The diagram should set out in a clear and concise format the structure and remit of the members, board of trustees, the trust's committees and any local committees or governing bodies (LGBs) – including the details of which governance functions have been delegated through a formal scheme of delegation, and which remain with the trust board. If you have already agreed a formal scheme of delegation, please submit a copy.

MATs have significant flexibilities in relation to governance, particularly through the ability to establish LGBs or other committees. An LGB can oversee a single academy or a group of academies. The trust board, or an LGB, can also have sub-committees that have delegated responsibilities or that act more in the way of advisory bodies. Sub-committees can also oversee trust wide functions, for example finance and resources.

Please use accompanying text to explain the detail of how your proposed multi-academy trust structure will work in practice, particularly how it will hold the chief executive officer or executive principals to account.



Please tick to confirm that a diagram of the structure and any additional detail has been attached.

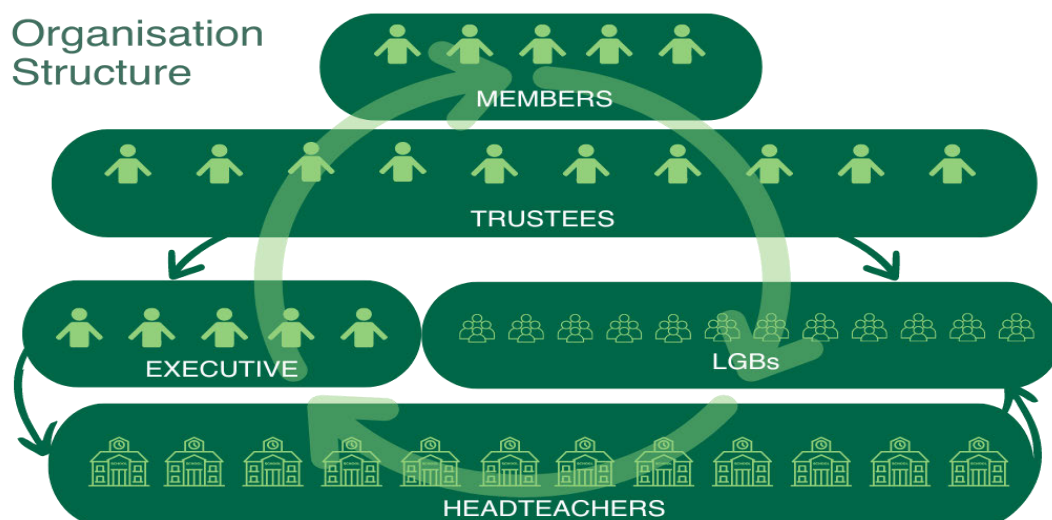
The board will be accountable for:

Ensuring clarity of vision, ethos and strategic direction. Holding executive leaders to account for the educational and wider performance of the organisation and its pupils, and the effective and efficient performance management of staff.

Overseeing the financial performance of the organisation and making sure its money is well spent. Committees will be in place for Audit and Risk, Education, Resources and Remuneration who will challenge Trust Leaders and use evidence based data to scrutinise all key areas of responsibility feeding their findings back to Trustees on a regular basis.

Members will appoint independent External Auditors to scrutinise the finances of the merged Trust and ensure that the statutory ATH regulations are adhered to.

Attached copy of LPAT Scheme of Delegation for reference



3. engagement

This section asks for details of any resolutions, consultation or stakeholder engagement that has taken place at this stage, including for any maintained school planning to convert at the same time as an academy transfer to the MAT or for the outgoing or incoming trust boards of any academy transfers.

Diocesan consent – confirm if applicable (attach to this application)

Yes, applicable – please see attached.

Board Resolutions – delete those not required, as part of this application from:

- the outgoing and incoming trust for academy transfers (attach to this application)

Please see resolutions attached

Outcome of any consultation – if none undertaken, when is this planned?

Stakeholder Consultation will commence at the end of January 2026 and will run for four term weeks

Outcome of any stakeholder engagement –if none undertaken, when is this planned? **NOTE** - the incoming trust should only engage with the stakeholders of the academy transferring once the department has decided upon the application.

Tupe consultation will commence following on from receipt of approval to merge from the Regional Director. This submission is due to be heard during the Advisory Board for the South East region dated 25th March 2026.

Section 4 – Declarations

This section asks your Chair of the academy trust to confirm that the information provided is correct.

Each academy trust involved must complete a declaration. If there are more than two trusts applying to transfer academies, please copy this declaration and submit it as an additional page.

Declaration (academy trust 1)

I hereby certify that the information entered in this form is correct. I understand that any decision made by the Regional Director on the basis of this information may be rendered null and void if the academy trust is found to have supplied inaccurate information.

I understand that no changes should be made to the trust's articles of association or other trust documents until the Regional Director has approved them.

I confirm that the trust has discharged its **public sector equality duties** in proposing this change, to ensure that the policies and practices adopted by the academy trust comply with the **equality duties** under the Equality Act 2010. **Please delete as appropriate**

When the board considered the equalities duty, it was decided that:

- The Secretary of State's decision is unlikely to disproportionately affect any particular person or group who share protected characteristics
- There are some impacts but on balance the changes will not disproportionately affect any particular person or group who share protected characteristics

Name	[Redacted]
[Redacted]	Learning Partners Academy Trust
Signature, electronic is sufficient	[Redacted]
Date	19 th December 2025

Declaration (academy trust 2)

I hereby certify that the information entered in this form is correct. I understand that any decision made by the Regional Director on the basis of this information may be rendered null and void if the academy trust is found to have supplied inaccurate information.

I understand that no changes should be made to the trust's articles of association or other trust documents until the Regional Director has approved them.

I confirm that the trust has discharged its **public sector equality duties** in proposing this change, to ensure that the policies and practices adopted by the academy trust comply with the **equality duties** under the Equality Act 2010.

Please delete as appropriate

When the board considered the equalities duty, it was decided that:

- The Secretary of State's decision is unlikely to disproportionately affect any particular person or group who share protected characteristics
- There are some impacts but on balance the changes will not disproportionately affect any particular person or group who share protected characteristics

Name	[REDACTED]
[REDACTED]	Learning Partners Church Academy Trust
Signature , electronic is sufficient	[REDACTED]
Date	19 th December 2025

Declaration (academy trust 3)

I hereby certify that the information entered in this form is correct. I understand that any decision made by the Regional Director on the basis of this information may be rendered null and void if the academy trust is found to have supplied inaccurate information.

I understand that no changes should be made to the trust's articles of association or other trust documents until the Regional Director has approved them.

I confirm that the trust has discharged its **public sector equality duties** in proposing this change, to ensure that the policies and practices adopted by the academy trust comply with the **equality duties** under the Equality Act 2010.

Please delete as appropriate

When the board considered the equalities duty, it was decided that:

- The Secretary of State's decision is unlikely to disproportionately affect any particular person or group who share protected characteristics
- There are some impacts but on balance the changes will not disproportionately affect any particular person or group who share protected characteristics

Name	[REDACTED]
[REDACTED]	Enlighten Learning Trust
Signature , electronic is sufficient	[REDACTED]
Date	19 th December 2025

The board will be accountable for:

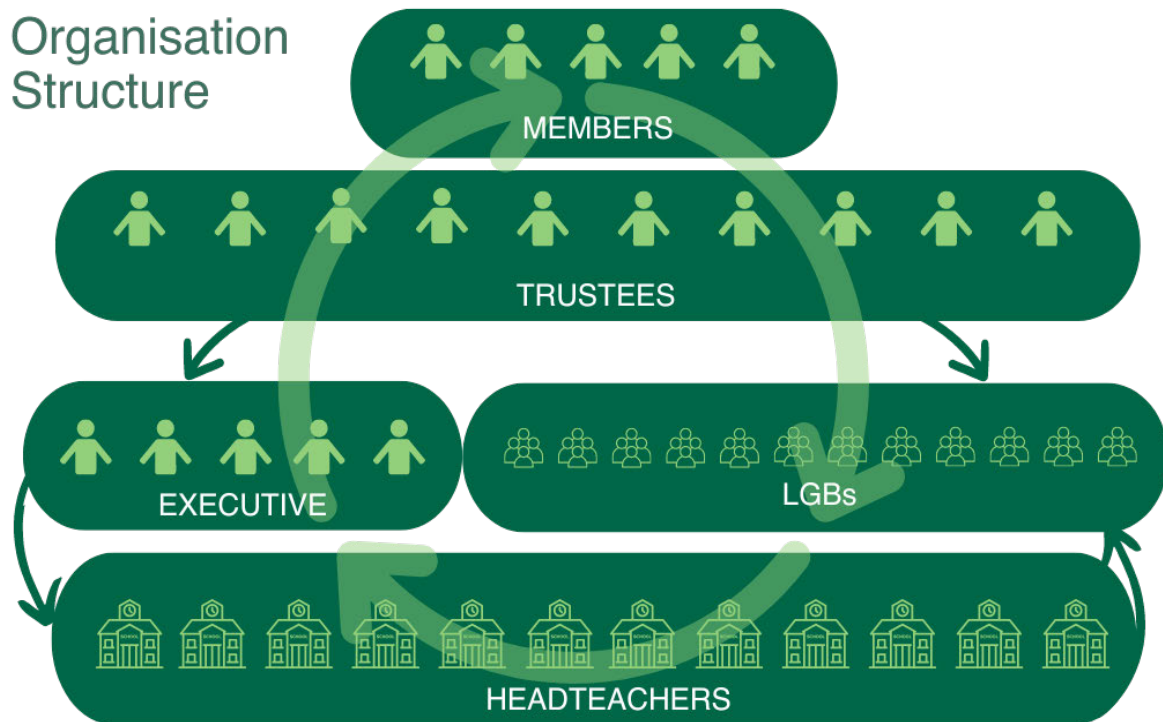
Ensuring clarity of vision, ethos and strategic direction. Holding executive leaders to account for the educational and wider performance of the organisation and its pupils, and the effective and efficient performance management of staff.

Overseeing the financial performance of the organisation and making sure its money is well spent. Committees will be in place for Audit and Risk, Education, Resources and Remuneration who will challenge Trust Leaders and use evidence based data to scrutinise all key areas of responsibility feeding their findings back to Trustees on a regular basis.

Members will appoint independent External Auditors to scrutinise the finances of the merged Trust and ensure that the statutory ATH regulations are adhered to.

Attached copy of LPAT Scheme of Delegation for reference.

Organisation Structure





RESOLUTION CONCERNING THE MERGER OF LPAT, LPCAT AND ELT

This note records that at their meeting on 18 December 2025, the trustees of the Learning Partners Church Academy Trust (LPCAT) formally approved the proposal that LPCAT should merge with the Learning Partners Academy Trust (LPAT) and the Enlighten Learning Trust (ELT), to form a single Multi-Academy Trust, subject to the following conditions:

- the proposed merger must comply fully with all legal and regulatory requirements; and
- all due diligence enquiries in relation to both LPAT and ELT must have been completed to the satisfaction of LPCAT's Board of Trustees.

Signed on behalf of the Board of Trustees

Learning Partners Church Academy Trust

Dated: 18 / 12 / 2025



Department
for Education

South East Regions Group
Sanctuary Buildings
Great Smith Street
London
SW1P 3BT
RG.SE@education.gov.uk

Jack Mayhew
Guildford County School,
Farnham Road,
Guildford,
GU2 4LU

By email: jmayhew@learningpartners.org
M Boddington (ELT) mboddington@enlightenlt.education
Alex Tear alex.tear@cofeguildford.org.uk

[REDACTED]

22 June 2026

Dear Jack,

Re: Application for the Learning Partners Church Academy Trust and Enlighten Learning Trust schools to join Learning Partners Academy Trust

I am happy to advise that the Regional Director has approved Learning Partners Church Academy Trust and Enlighten Learning Trust to merge with Learning Partners Academy Trust (LPAT), which will be achieved by all schools in both these trusts to transfer to LPAT.

Please do not hesitate to contact me with any queries.

[REDACTED]

18 December 2025
Resolution Number: 20251218-01

Resolution for Trust Board Meeting 18 December 2025

Intention of Learning Partners Academy Trust, Learning Partners Church Academy Trust Merger, Enlighten Learning Trust

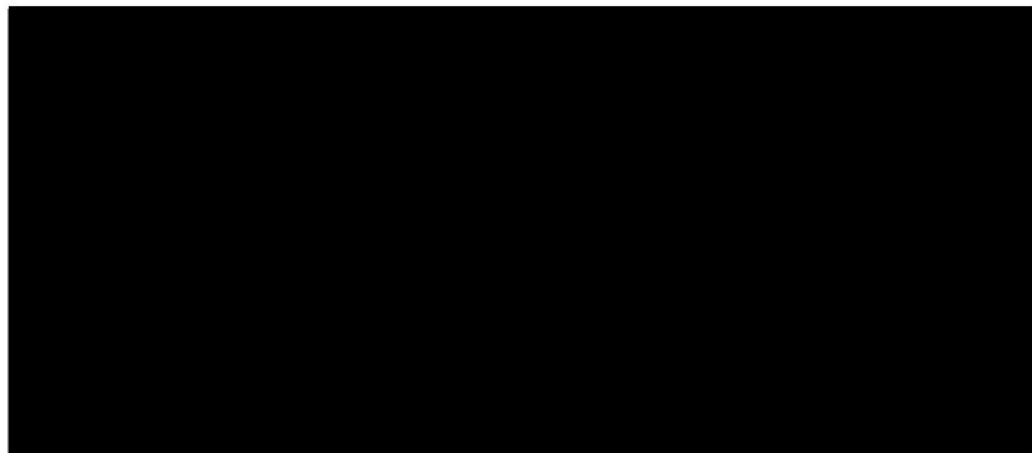
1 Introduction

Learning Partners Academy Trust (LPAT) Trustees have discussed and explored the possibilities of merging with Learning Partners Church Academy Trust (LPCAT) and Enlighten Learning Trust (ELT). Recognising the mutual benefits of collaboration, alignment of strategic goals and the shared vision for delivering outstanding education across our academies. The due diligence reports have been prepared and shared with LPAT Trust Board prior to this Resolution being agreed. The Board of Trustees of LPAT, LPCAT and ELT hereby formalise their intention to merge into a single Multi-Academy Trust (MAT). This merger will aim to optimise resources, enhance education outcomes and strengthen the governance to serve the interests of all pupils, staff and communities.

2 Resolution

We, the Board of Trustees of LPAT, declare our intent to approve the merger with LPCAT and ELT into a unified MAT entity, subject to legal and regulatory compliance, stakeholder engagement and due diligence.

The contents of the equity articles and members agreement will be agreed prior to the merger.



Church House Guildford
20 Alan Turing Road
Guildford
Surrey GU2 7YF

26th November 2025

Sent by e-mail

Dear Jack and Mike

DBE approval for merger proposals for LPAT, ELT and LPCAT

I am pleased to inform you that the Diocesan Board of Education have approved the proposals for LPAT, ELT and LPCAT to merge.

The next steps are the following:

- The Trusts to inform the Regional Director of Diocesan approval as part of the merger application to the Regional Director
- To ask our legal advisers to agree the final wording of the Church of England Articles of Association with the appropriate 'Equity' Clauses
- To confirm the content and wording of the Members side agreement which will accompany the Articles of Association
- When these agreed, to ask the Members of all three Trusts to adopt the new Articles of Association by Special Resolution

As discussed, I will write to all our Church schools and other Church Trusts later this week to inform them of the DBE's decision. A copy of that letter is attached for reference to share with your Members and Trustees.

Please pass on my thanks to your trustees and staff who have worked hard to prepare the Trusts for merger.

I look forward to continuing to work with you as we prepare the Trusts for merger.

Yours sincerely,

Church House Guildford, 20 Alan Turing Road, Guildford, Surrey, GU2 7YF
T: 01483 790300 **E:** info@cofeguildford.org.uk **www.cofeguildford.org.uk**

The Guildford Diocesan Board of Finance is a registered charity (248245)
and a company limited by guarantee (225289)



Canon (Mr) Alex Tear FCCT
Diocesan Director of Education



MAT Merger Programme Plan – Target Transfer Date 1 January 2027

1. Key Assumptions and Milestones

- MAT to MAT Merger form submitted: **19th December 2025**
- Steering Group agreed proposed January 2027 3-1 merger target date: **12th February 2026**
- Regional Director (RD) decision on MAT Merger form scheduled: **25 March 2026**.
- Target legal completion / transfer date 3-1 merged trust: **1 January 2027**.
- Equity Articles agreed in principle and with DBE solicitors for finalisation.

High-Level Milestones

Period	Milestone
Feb–Mar 2026	RD decision on MAT Merger form; (recommendation to approve advised), DfE confirm in-principal approval.
Mar–Jun 2026	Finalise governance model, vision & values, equity articles, executive agreed, project & education team appointed, diocesan and site arrangements planned. Stakeholder consultation commences.
May–Oct 2026	TUPE and staff consultation; risk profiling and management; policies and systems alignment planned.
Sep–Dec 2026	Statutory/completion documentation, funding agreements, leases/CSAs, operational transition planning.
1 Jan 2027	Legal completion 3-1 trust merger: academies transfer; new merged trust operational.
Jan 2027–Mar 2028	Integration, culture, training and merged trust school improvement planning; benefits realisation.

2. Governance and Legal Workstream

Feb–Jun 2026: Design and Approvals

1. Articles of Association and church documentation

- Finalise Equity Articles (objects, member/trustee composition, reserved matters, local governance).
- Secure conditional and then final diocesan consents for all church schools, including any Members' Agreements, MoUs and Church Supplemental Agreements.

2. Members, trustees and local governance

- Appoint agreed members and trustees of the new trust, ensuring required diocesan appointments and any foundation trustee ratios.
- Design and approve a new Scheme of Delegation (sub scheme??) for local governing bodies, protecting church school ethos and community representation.
- Stakeholder consultation plans agreed and communicated.

3. DfE and charity/company processes

- Respond to RD queries and conditions following March panel, including any requirement for updated financial plans and due diligence outputs.
- Prepare board resolutions in each trust approving the merger terms, Article changes and transfer documentation.

- Submit any required Charity Commission consents for regulated alterations to objects.

Jul–Dec 2026: Transaction Documents and Completion Readiness

1. Funding agreements and deeds

- Draft and agree Deeds of Novation and Variation for incoming academies and any master funding agreement changes.
- Prepare Deeds of Termination and Release for closing trusts.

2. Land and site arrangements

- Map land interests for all schools (leases, freeholds, CSAs, PFI sites).
- Prepare and agree assignments, transfers and new CSAs as required with diocesan trustees and local authorities.

3. Company law and registration

- Update Companies House filings for directors, registered office and Articles.
- Plan filings for closing trusts through to dissolution post-transfer.

4. Legal completion checklist

- Maintain a consolidated conditions precedent list covering DfE, dioceses, lenders, PFI counterparties and landlords, with clear ownership and deadlines.
- Confirm all conditions satisfied at least four weeks prior to 1 January 2027 where possible.

3. Educational, People and Culture Workstream

Mar–Oct 2026: Due Diligence and Design

1. Educational due diligence

- Complete school improvement, safeguarding and curriculum due diligence across all academies.
- Identify strengths, risks and support requirements; feed these into RD assurance and trust risk register.
- Agree the future school improvement strategy, including hub structures, executive leadership roles and church school distinctiveness support.

2. Organisational design

- Design the future central team (education, HR, finance, estates, IT, governance).
- Agree SLT and principal reporting lines and any new cross-trust roles (e.g. Director of Church School Effectiveness, Director of Inclusion).
- Consult with affected post-holders on proposed structural changes.

3. TUPE and workforce engagement

- Map all transferring staff, including centrally employed and diocesan-funded roles.
- Engage early with trade unions and staff to explain rationale, timeline and likely impact.
- Run formal TUPE consultation in line with legal advice and the agreed timetable.

Sep–Dec 2026: Implementation Readiness

1. Policies and safeguarding alignment

- Harmonise key safeguarding, behaviour, SEND, HR and exclusions policies ahead of day one.
- Ensure diocesan requirements for RE, worship and ethos are fully integrated for church schools.
- Identify permitted local variations, particularly for admissions and worship within statutory and diocesan frameworks.

2. Cultural integration and communications

- Co-create a shared vision and values set that brings together church and community identities.
- Develop and deliver a communications plan for staff, parents, pupils, dioceses and local authorities, including clear FAQs.
- Schedule engagement events (briefings, Q&A sessions) during each key phase.

3. Training and induction

- Plan trust-wide induction for all central staff, headteachers and local governors (Dec 2026/Jan 2027).
- Cover governance, financial regulations, safeguarding, ethos and key policies.
- Prepare onboarding materials and e-learning packages.

4. Finance, Estates, IT and Operations Workstream

Apr–Oct 2026: Due Diligence and Design

1. Financial due diligence and planning

- Produce a consolidated 3–5 year financial plan for the merged trust.
- Agree the central top-slice, service offer and financial KPIs.

2. Banking, audit and insurance

- Select future banking provider(s) and agree account structure and signatories.
- Appoint auditors and confirm audit timetable
- Manage outgoing trusts company/ financial close/ wind up.
- Align insurance arrangements and decide on a single provider and renewal cycle.

3. Estates and capital

- Develop a combined estates strategy and asset management plan for the merged estate.
- Align capital projects, maintenance plans and condition funding across schools.
- Ensure stewardship expectations for church assets are reflected.

4. IT and data

- Decide on preferred MIS, finance, HR and payroll systems.
- Plan data migration and transition, including safeguarding and SEN data.
- Establish a unified data protection framework and data-sharing agreements between legacy trusts.
- Procure/ implement (in house) payroll provider

Oct–Dec 2026: Transition Planning

1. Operational transition

- Finalise day-one processes for payroll, pensions, procurement, expenses and incident reporting.
- Test payroll and core systems in advance to avoid disruption.
- Produce a “Day One Handbook” for school leaders and business managers summarising key contacts, processes and delegations.

2. Risk management and business continuity

- Maintain a programme-level risk register with clear owners and mitigations.
- Project team & Operational leads, agree post-merger integration and collaboration plan.
- Develop contingency plans for delayed transfer (e.g. move date to 1 April 2027) and agree escalation triggers and mitigations.
- Run readiness process (payroll, ICT, Site teams etc) review in November/December 2026.

5. Post-Merger Integration (Jan 2027–Mar 2028)

First 3 Months (Jan–Mar 2027)

- Implement agreed collaboration plan, day one requires aligning financial practices, safeguarding practices, escalation routes and reporting.
- Confirm governance tone and title (board, committees, local boards) and ensure all bodies are quorate and trained.
- Monitor operational stability (payroll, IT, safeguarding, SEND, estates etc) and resolve an action plan for legacy issues identified in due diligence.
- Programme calendar spaces for “mid project review” project team meetings. (Plan/ Adjust)

Months 4–12 (Apr–Dec 2027)

- Embed cross trust professional networks (curriculum, SEND, Christian distinctiveness, business management, H&S, site teams, finance, HR, ICT etc).
- Review and refine the Scheme of Delegation (agreed sub scheme) and central service offer based on practice and feedback.
- Track progress against original merger objectives (educational outcomes, financial resilience, estate utilisation, leadership capacity).

Months 12–18 (Jan–Jun 2028)

- Conduct a formal evaluation of merger benefits and lessons learned.
- 12 mos post-merger report for Trustees/ HTs/ DfE/ DBE and following 12 mos action plans
- Use findings to inform the next phase of trust development (restructure, hub configuration, further partnerships or growth planning).

Inclusion Plan – DfE Submission

The Trust has identified Inclusion as a central strategic priority, aligned with its vision of enabling all children to thrive across a diverse family of schools. This priority is being delivered through a whole-system approach that embeds a coherent set of principles and evidence-informed practices across leadership, teaching, behaviour, attendance and curriculum. These principles — dignity, expertise, belonging, broad definitions of success, and shared responsibility — underpin all improvement activity and set consistent expectations across the Trust.

Strategic Approach

The Trust is implementing a cultural and pedagogical shift towards a relational, capability-building model of inclusion. All schools and governing bodies are adopting these principles to shape school-level practice, behaviour systems, and leadership decision-making.

The Trust is also strengthening consistency through governance and leadership oversight, including termly evaluation, learning walks, lesson observations and structured conversations during School Improvement Partner visits

Professional Development and Training Programme

To support implementation at scale, the Trust has established a comprehensive CPD programme working in partnership with Pond Meadow Special School focused on inclusive practice, relational approaches and specialist SEND expertise.

This combined programme ensures a coherent, sequenced professional learning offer across the Trust.

Expected Outcomes

The Trust's Inclusion strategy aims to deliver measurable improvements in pupil experience, staff capability and organisational culture, including:

- Increased staff confidence and expertise in meeting diverse learner needs,
- Improved relational cultures, reflected in reductions in detentions, suspensions and internal exclusions, alongside more restorative
- Improved attendance through inclusive, preventative strategies aligned with national guidance on emotional-based school non-attendance and attendance expectations
- Greater pupil sense of belonging.
- Strengthened inclusive pedagogy, curriculum development and transition practice across the Trust, supported by subject networks and cross-phase collaboration

18th December 2025

Resolution to Submit MAT to MAT merger form for Merger with Learning Partners Academy Trust (LPAT)

In February 2025 Enlighten Learning Trust (ELT) Trustees, having explored the possibilities and advantages of merging with another trust, resolved to explore a merger with Learning Partners Academy Trust (LPAT).

This merger will aim to optimise resources, develop our combined staff, enhance education outcomes for all and strengthen governance of the merged trust to serve the interests of all our pupils, staff and communities.

Since then, LPAT have adopted Church Equity Articles meaning ELT are able to merge with them. The proposed merge has also had the approval of Guildford Diocesan Board of Education, and we have been consulting with our Headteachers and Chairs of Governors. Due diligence has been undertaken by all parties on each other, reviewed and approved by ELT Trustees.

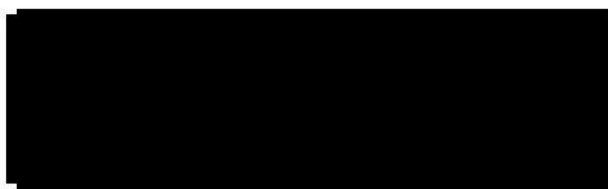
Trust Leaders and other staff in schools have started to work together in different forms of collaboration and professional development to support greater cultural alignment.

The Board of Trustees of Enlighten Learning Trust (ELT) resolved to proceed with the merger and agree to the submission of the MAT to MAT merger form to the Regional Director for consideration and approval.

The Board have read the MAT to MAT merger form and agree to its content.

Adopted by ELT Board of Trustees

Date: 18 December 2025



Proposed School Hubs – Broadly Geographic

North

Southborough (SBO)
Esher High School (EHS)
Fullbrook School (FBR)
Pyford CoE Primary (PYR)
Horsell CoE Junior School (HSL)
St Marys CoE Primary (SMY)
St Lawrence CoE Primary (SLW)
St Martin's CoE Infants & Junior (SMT)
St Andrew's CoE Primary (SAR)

West

George Abbot (GAB)
Surrey Maths School (SuMS)
Kings College (KCG)
Guildford Grove Primary (GGR)
Pirbright Village Primary (PBR)
Boxgrove Primary School (BGR)
Northmead Junior School (NME)
Stoughton Infant School (STO)
Burpham Primary School (BUR)
Pond Meadow School (PMW)

South

Guildford County School (GCS)
Glebelands School (GLB)
The Priory CoE School (PRY)
Shalford Infants (SHF)
Tillingbourne Junior School (TBN)
Loseley Fields Primary (LFI)
Farncombe CoE Infant (FNC)
St Nicolas CoE Infants (SNL)
Sandfield Primary (SFI)

While producing accurate three-year pupil forecasts is challenging, the Trust has reviewed projections provided by the Local Authority (LA) and examined local contextual data. This analysis has identified four schools that may be at risk of low pupil numbers: one secondary school, two primary schools, and one infant school.

Secondary School Mitigation

To address the risk at the secondary school, the merged Trust will implement an intensive school improvement programme aimed at raising educational outcomes. LPAT has a well-established and well-resourced School Improvement Team that delivers the proven ASIS (Additional School Improvement Support) programme, validated by Ofsted. In addition, LPAT operates a Trust-wide attendance strategy led by specialists in collaboration with Surrey LA, with the goal of improving attendance and, consequently, pupil outcomes. In the short term, leadership will be reviewed, with the potential redeployment of the Trust's most effective leaders. The school will be closely monitored by the Executive Team and the Trust Board.

Primary Schools Mitigation

For the two primary schools identified:

- At the first school, demographic data indicates a significant decline in birth rates within the area. The Trust has applied for a reduction in PAN (Published Admission Number) and initiated a leadership restructure.
- At the second school, due diligence also suggests a declining birth rate. A leadership restructure has been implemented, and an Executive Leadership model is now in place. Mixed-age teaching has been introduced to maintain high-quality teaching and learning. Longer-term plans include repurposing the site to expand specialist provision. Surrey LA supports this plan, which involves the Trust providing specialist ASD placements across all key stages. These plans are well developed.

Infant School Mitigation

For the infant school identified as potentially at risk, several actions have already been taken. From January 2026, the transition to an Executive Leadership model will begin, with full implementation by September 2026. The school will work closely with the receiving junior school, leveraging central team capacity to support a marketing strategy and strengthen financial oversight, contextual data. This analysis has identified four schools that may be at risk of low pupil numbers: one secondary school, two primary schools, and one infant school.

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Attachment 1

Inclusion Plan – DfE Submission

The Trust has identified Inclusion as a central strategic priority, aligned with its vision of enabling all children to thrive across a diverse family of schools. This priority is being delivered through a whole-system approach that embeds a coherent set of principles and evidence-informed practices across leadership, teaching, behaviour, attendance and curriculum. These principles — dignity, expertise, belonging, broad definitions of success, and shared responsibility — underpin all improvement activity and set consistent expectations across the Trust.

Strategic Approach

The Trust is implementing a cultural and pedagogical shift towards a relational, capability-building model of inclusion. All schools and governing bodies are adopting these principles to shape school-level practice, behaviour systems, and leadership decision-making.

The Trust is also strengthening consistency through governance and leadership oversight, including termly evaluation, learning walks, lesson observations and structured conversations during School Improvement Partner visits

Professional Development and Training Programme

To support implementation at scale, the Trust has established a comprehensive CPD programme working in partnership with Pond Meadow Special School focused on inclusive practice, relational approaches and specialist SEND expertise.

This combined programme ensures a coherent, sequenced professional learning offer across the Trust.

Expected Outcomes

The Trust's Inclusion strategy aims to deliver measurable improvements in pupil experience, staff capability and organisational culture, including:

- Increased staff confidence and expertise in meeting diverse learner needs,
- Improved relational cultures, reflected in reductions in detentions, suspensions and internal exclusions, alongside more restorative
- Improved attendance through inclusive, preventative strategies aligned with national guidance on emotional-based school non-attendance and attendance expectations
- Greater pupil sense of belonging.
- Strengthened inclusive pedagogy, curriculum development and transition practice across the Trust, supported by subject networks and cross-phase collaboration

Attachment 2

Learning Partners: School Improvement Delivery Plan 2025-2027

February 2026

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Executive Summary

Learning Partners Academy Trust (LPAT) is committed to delivering sustainable, evidence-informed school improvement across existing trust schools and the consolidated merged trust. This paper outlines a comprehensive school improvement delivery plan for the period 2025-2027, aligned with the Department for Education's expectations and informed by the Ofsted (MAT) inspection framework beginning September 2027-28.

This plan is structured to support the 3-1 trust merger (consolidating ELT, LPCAT, and LPAT into a unified 30-school trust), which is anticipated to complete by Spring (2) 2027, whilst ensuring continuity of educational excellence and demonstrable improvement across all schools.

Key Strategic Priorities

- **Sustainable Educational Excellence** (Throughout): Ensuring all pupils access great schools with above-national progress targets
- **Merger Completion and Embedding** (January 2027 – August 2027): Establishing integrated governance, operational alignment, and unified central services
- **Integrated Operational Restructure** (September 2027 – March 2028): Implementing aligned service delivery model across consolidated trust
- **Ofsted MAT Inspection Readiness** (April 2028 onwards): Demonstrating cohesive central operations and effective school improvement infrastructure

How this Delivery Plan links to the School Improvement Strategy

This Delivery Plan should be read alongside the **Learning Partners School Improvement Strategy 2025–27**, which is the main reference document for headteachers, school leaders and governors on how school improvement is experienced in schools. The Strategy explains the Trusts purpose, values and three pillar framework (leadership, professional practice and pedagogy) and sets out the core offer, categorisation model and ASIS support services. The three pillar framework (leadership, professional practice and pedagogy) and sets out the core offer, categorisation model and ASIS support

This Delivery Plan sets out how the Trust will deliver that same school improvement approach over 2025–27 at organisational level, including the 3–1 merger, the development of central capacity and our readiness for Ofsted's MAT inspection framework. It provides the organisational narrative, milestones, risks and success criteria required by the Board of Trustees, the Department for Education (DfE) and other key partner external stakeholders.

Broadly the delivery plan is linked to the School Improvement Strategy, as follows:

- The Strategy describes what school improvement looks and delivers for schools: the vision, principles, three pillars and core offer to every Learning Partners school. The Delivery Plan shows how the Trust will organise itself so that this offer is sustainable and consistently delivered across a 30+ school organisation.
- The Strategy explains what support schools can expect, including categorisation, the three tier framework (working alongside, ASIS), inspection support and incident support pathways. The Delivery Plan sets out how these commitments are resourced, sequenced and monitored, including staffing, timelines and measures of impact. The three tier framework (
- The Strategy gives leaders a narrative they can share with their communities about the Trusts collective ambitions for pupils, teaching and inclusion. The Delivery Plan provides assurance

to Trustees and the DfE that those ambitions are underpinned by capacity planning, risk management and alignment to educational expectations.

Section 1: Context and Strategic Drivers

1.1 Organisational Context

Learning Partners Academy Trust currently operates with a hub-based service delivery model across education, established in September 2025, providing semi-centralised support across our schools. We are proposing a 3-1 consolidation merger with ELT (Enlighten Learning Trust) and LPCAT (Learning Partners Church Academy Trust), creating a unified trust of 30+ schools.

The merger is currently under review with the DfE's Regional Director, with Advisory Board decision anticipated by 31 March 2026.

1.2 School Improvement Foundation

School improvement is the core business of Learning Partners. The Trusts approach is grounded in:

- **Evidence-Based Practice:** Drawing on CST Knowledge Building in MATs, DfE School Improvement Guidance, and best practice research
- **Sustainable Capacity:** Building internal capability through leadership development, professional learning, and quality assurance
- **Inclusive Excellence:** Ensuring equity of access and outcome for all pupils, regardless of circumstance
- **Collaborative Networks:** Leveraging trust expertise and external partnerships (SAfE, Teaching School Hubs, regional Maths and English Hubs, specialist consultancies)

1.3 DfE Alignment and Inspection Framework

The new Ofsted MAT inspection framework (September 2027-28 onwards) assesses trusts on:

- **Cohesion of Central Engine:** How effectively the trust operates as a unified system rather than a collection of schools
- **Strategic Direction and Accountability:** Clear governance, resource allocation, and strategic foresight
- **Impact on School Improvement:** Demonstrable progress in attainment, progress, and inclusion across schools
- **Systems and Processes:** Effective, auditable operational and quality assurance systems

This delivery plan ensures Learning Partners is in a strong position to demonstrate integrated, effective central operations by the time inspections commence.

Section 2: Current State Assessment

2.1 Baseline Performance Against National Benchmarks

All Learning Partners schools undertake annual categorisation visits (typically end of summer term) to assess performance against national benchmarks and trust key performance indicators (KPIs). A baseline assessment is undertaken for all new schools during due diligence, establishing overall school performance positioning.

Schools are categorised against our **Trust Dozen** performance indicators (Appendix 1), which outline:

- Attainment targets aligned to national expectations
- Progress measures exceeding national average

- Inclusion and SEND support benchmarks
- Leadership capacity and effectiveness metrics
- Teaching and learning quality indicators

2.2 School Categorisation Model

Schools are placed on one of three support tiers:

Tier A: Universal Support (Core Offer) – All schools

- Professional development and centralised CPD
- Shared trust-wide resources and curriculum framework
- Data-driven monitoring and collaboration hubs
- 4-6 days of School Improvement Partner (SIP) allocation annually

Tier B: Working Alongside Schools – Schools with identified development needs

- Structured SIP support cycle (4 visits per academic year)
- Targeted quality assurance
- Lead practitioner deployment where appropriate
- Headteacher performance management and standards review

Tier C: Additional School Improvement Support (ASIS) – Schools requiring intensive intervention

- Assigned School Support Partner (5 days, extendable to 18 months)
- Collaborative action planning
- Targeted training and peer support from high-performing schools
- Enhanced CEO and Executive oversight
- Budget allocation for improvement initiatives (£5k per school)

2.3 Current Trust Capacity

Our school improvement infrastructure includes:

Central School Improvement Team

- Director of Education (2 FTE) – Kathryn Krynicki and Helen Gregory
- School Improvement Partners – Primary and Secondary specialists
- Trust Inclusion Lead – Olivia Wernick
- Teaching and Curriculum Leads – Primary (Rachel Hughlock) and Secondary (Laura Cripps)
- School Improvement Co-ordinator – Tanya Marchetti
- Trust Mental Health and Safeguarding Lead – Holly Wise
- Trust School Data Lead – Shaun Fishburn
- Network of Trust Lead Practitioners (cross-trust deployed practitioners)

External Partners

- Teaching School Hubs (regional)
- Maths and English Hubs (Southeast region)
- SAfE (Strategic Alliance for Education)
- Commissioned specialists for targeted intervention

Section 3: Delivery Plan Timeline and Milestones (2026-2028)

Phase 1: Merger Completion and Initial Integration (February 2026 – August 2027)

Duration: 18 months

Primary Focus: Securing DfE approval, legal completion, and establishing integrated governance and operational structures

Phase 1a: Strategic Decision and DfE Communication (February 2026)

Objectives:

- Confirm merger progression to all stakeholders
- Communicate to DfE the phased, sequenced approach to major transformation programmes
- Address DfE concerns regarding concurrent major change initiatives

Actions:

- Executive statement to all staff confirming merger as strategic priority
- Acknowledgment of consultation feedback received on proposed operational restructure; commitment to meaningful post-merger review
- Public commitment to phased delivery roadmap: Merger completion, embedding (6-9 months), then integrated operational restructure
- Formal DfE submission with clear timeline and integrated delivery plan

Timeline: February 2026

Responsible: Chief Executive Officer, Executive Leadership Team, Board of Trustees

DfE Alignment: Demonstrates strategic clarity and realistic capacity planning

Phase 1b: Consultation Feedback Review and Stakeholder Engagement (February – March 2026)

Objectives:

- Systematically review all restructure consultation feedback received from staff across all school types and levels
- Specifically engage with secondary headteachers and incoming trust leaders to understand concerns in depth
- Document findings for post-merger design team
- Communicate back to staff on how feedback will inform future design

Actions:

- Structured analysis of consultation themes, concerns, and design implications
- Dedicated engagement sessions with secondary headteachers (LPAT and incoming ELT/LPCAT leaders)
- Sessions with school leaders and staff representatives from all three trusts
- Documentation of feedback summary and response briefing document
- Communication to all staff explaining consultation review outcome and post-merger design process timeline

Timeline: February – March 2026

Responsible: Director of Education, HR/Change Management Lead, School Improvement Co-ordinator

Outcome: Consolidated feedback document and stakeholder engagement log for DfE submission

Phase 1c: Regulatory and Legal Processes (March – September 2026)

Objectives:

- Achieve DfE and Regional Director approval for 3-1 merger

- Complete legal processes and formal trust consolidation
- Establish preliminary integrated governance structures
- Prepare for September 2026 operational transition

Actions:

- Advisory Board decision on merger proposal (target: end of March 2026)
- Regional Director assessment and approval recommendation to DfE (timeline: Q1-Q2 2026)
- Legal completion and trust consolidation (target: September 2026)
- Establishment of unified Board of Trustees governance structure
- Transition planning for central services and operational alignment

Timeline: March – September 2026

Responsible: Chief Executive Officer, Governance Lead, Legal Support

DfE Engagement: Regular engagement with Regional Director and DfE case officer on progress

Phase 1d: Merger Embedding and Initial Alignment (September 2026 – August 2027)

Objectives:

- Establish aligned central team and governance across three former trusts
- Develop unified trust policies, procedures, and systems
- Create coherent staff identity and trust culture
- Build integrated quality assurance and data systems

Q1 2026-27 (September – November 2026)

- Establish unified Executive Leadership Team (consolidated from three trusts)
- Publish unified trust policies and procedures affecting all schools
- Align IT systems and data platforms across three trusts
- Conduct "getting to know you" leadership sessions for new trust staff
- Hold unified launch event for all three trust communities

Q2 2026-27 (December 2026 – March 2027)

- Align financial systems and budgeting processes
- Establish unified quality assurance processes and inspection readiness protocols
- Consolidate safeguarding frameworks and undertake cross-trust audit
- Initiate unified curriculum framework development with input from all schools
- Hold trust-wide professional development session for all leaders

Q3 2026-27 (April – July 2027)

- Complete financial year transition and audit alignment
- Conduct unified summer term SIP categorisation visits (all 30 schools in integrated framework)
- Establish summer term leaders' conference bringing all three trust school cohorts together
- Publish annual report reflecting unified trust operating model
- Confirm integrated restructure design brief and stakeholder consultation timeline

Q4 2026-27 (August 2027)

- Final embedding review and readiness assessment
- Approve integrated operational restructure design and action plan
- Confirm September 2027 restructure commencement timeline

- Final preparation briefing for all staff

Timeline: September 2026 – August 2027 (12 months embedding period)

Responsible: Chief Executive Officer, Directors of Education, Executive Leadership Team, CEO

Success Indicators:

- Single, unified governance and decision-making structures operational
- Alignment audit confirming 90%+ policy and procedure alignment
- Staff feedback survey showing improved trust identity and reduced fragmentation
- DfE feedback confirming integration progress
- Ofsted readiness assessment indicating adequate central team cohesion foundations

Phase 2: Integrated Operational Restructure and Implementation (June 2027 – March 2028)

Duration: 10 months (design, consultation, implementation)

Primary Focus: Designing and implementing aligned operational structures for consolidated 30-school trust

Phase 2a: Integrated Restructure Design (June – August 2027)

Objectives:

- Co-design operational structures with representatives from all 30 schools
- Incorporate consultation feedback from original restructure engagement
- Develop detailed restructure proposal with clear role definitions, reporting lines, and accountabilities
- Prepare for staff consultation and TUPE processes

Actions:

- Establish integrated design team with representation from all three former trusts (secondary headteachers, primary headteachers, school business managers, union representatives)
- Review and synthesise Phase 1b consultation feedback (February-March 2026)
- Engage with secondary headteachers and school leaders to ensure inclusive design process
- Develop role descriptions, person specifications, and reporting structures for unified operations
- Create implementation timeline and resource plan with identified training and communication phases
- Conduct equality impact assessments on proposed structures
- Finalise proposal for Executive board approval (end of August 2027)

Timeline: June – August 2027

Responsible: Director of Education, HR/Change Management Lead, Design Team representatives

Key Outcome: Agreed restructure proposal ready for staff consultation

Phase 2b: Staff Consultation and Refinement (September – October 2027)

Objectives:

- Conduct meaningful consultation with all staff across 30 schools
- Gather feedback and refine proposals as appropriate
- Begin formal TUPE notification processes where required
- Secure staff engagement and "buy-in" for implementation

Actions:

- Distribute full restructure proposal to all staff with clear explanations
- Hold consultation meetings across primary, secondary, and central services cohorts
- Publish Q&A guidance addressing staff concerns and questions
- Refine proposal based on consultation feedback (where appropriate)
- Issue formal TUPE notifications (if applicable under employment law)
- Hold final confirmation meetings with affected staff members
- Communicate final approved structure to all stakeholders

Timeline: September – October 2027

Responsible: Director of Education, HR Lead, Executive Leadership Team

Engagement: 100% of affected staff engaged in consultation meetings

Phase 2c: Restructure Implementation (November 2027 – March 2028)

Objectives:

- Appoint to new roles through fair and transparent recruitment processes
- Establish new operational structures and reporting lines
- Ensure continuity of service delivery and school support throughout transition
- Build capability and confidence in new roles and structures

Key Implementation Activities:

November 2027 – January 2028 (Appointment Phase)

- Conduct recruitment for new roles (slotting in where contractually appropriate)
- Provide transition support and induction for newly appointed staff
- Establish new team structures and reporting relationships
- Conduct team launch sessions for each new unit

February – March 2028 (Transition Phase)

- Handover from old to new structures
- Finalise all personnel file updates and contractual arrangements
- Conduct full operational testing of new systems and processes
- Hold "team readiness" reviews for each operational unit
- Communicate final structure and accountabilities to all schools
- Conduct staff survey on transition experience and identify any final support needs

Timeline: November 2027 – March 2028 (5 months implementation)

Responsible: HR Lead, Directors of Education, Operational Unit Leaders

Success Indicators:

- 100% of new roles appointed and staff in place
- <2% of staff requiring additional transition support
- 85% staff engagement survey score (understanding role and accountabilities in the new structure")
- Zero disruption to school support services during transition

Phase 2d: Embedding and Stabilisation (April – September 2028)

Objectives:

- Embed new operational structures into business-as-usual practice
- Ensure new structures deliver the intended school improvement impact
- Refine processes based on early learning and feedback
- Prepare for Ofsted MAT inspection readiness

Actions:

- First full term of operation under new structures
- Conduct "lessons learned" review of restructure implementation process
- Refine operational procedures and support models based on early experience
- Hold structured team reviews and performance check-ins
- Collect evidence of improved school support and collaboration
- Conduct readiness assessment for Ofsted MAT inspection (Summer 2028)

Timeline: April – September 2028

Responsible: Chief Executive Officer, Directors of Education, Operational Leadership Team

Success Indicators:

- School satisfaction survey: >80% satisfaction with trust central support
- Operational efficiency metrics achieved and monitored
- Zero escalated complaints related to restructure or transition
- Evidence of improved inter-school collaboration and practice sharing
- Positive internal readiness assessment for Ofsted MAT inspection

Phase 3: Ofsted MAT Inspection Readiness and Continuous Improvement (April 2028 onwards)

Duration: Ongoing (with inspection cycle commencing September 2028-29)

Primary Focus: Demonstrating to inspectors a cohesive, effective central engine and proven school improvement impact

Phase 3a: Central Operations Excellence (Continuous)

Objectives:

- Ensure central team is operating as a unified, coherent engine
- Demonstrate effective governance, strategy, and accountability
- Show clear impact of central operations on school improvement

Ongoing Actions:

- Regular review of central team performance against Ofsted MAT framework criteria
- Maintain integrated quality assurance systems with transparent data on school progress
- Conduct annual readiness audits assessing alignment to inspection framework
- Update strategic improvement plans based on evidence and emerging needs
- Maintain regular engagement with DfE and Regional Director

Responsible: Chief Executive Officer, Executive Leadership Team, Board of Trustees

Phase 3b: School Improvement Evidence (Continuous)

Objectives:

- Demonstrate sustained improvement in schools
- Show progress toward national benchmark targets
- Evidence the impact of trust school improvement infrastructure

Ongoing Actions:

- Maintain robust data systems tracking progress across all schools
- Conduct termly categorisation reviews and course correct as needed
- Document case studies of school improvement journeys (schools moving categories)
- Build evidence portfolio of ASIS programme impact and outcomes
- Track progress on teaching and learning, inclusion, and leadership across schools

Responsible: Directors of Education, School Improvement Partners, School Improvement Co-ordinator

Phase 3c: External Validation and Inspection Support (September 2028-29 onwards)

Objectives:

- Prepare thoroughly for Ofsted MAT inspection
- Demonstrate evidence of effective practice and impact
- Support inspectors' understanding of trust improvement model

Actions:

- Commission external MAT readiness review (Summer 2028)
- Prepare inspection evidence portfolio (school progress data, case studies, school improvement processes)
- Hold inspection readiness sessions with all schools
- Establish inspection liaison and communication protocols
- Support inspectors during MAT inspection process
- Use inspection feedback to inform next phase of improvement planning

Responsible: CEO, Directors of Education, Governance

Section 4: School Improvement Framework: Universal Core Offer

All 30 Learning Partners schools benefit from a comprehensive core offer delivered through the School Improvement Team. The framework is built around **three pillars: Leadership, Professional Practice (Teaching and Learning), and Pedagogy.**

4.1 Core Offer Components

All schools receive:

- **Allocated School Improvement Partner** (Director of Education + SIP paired assignment)
- **Centralised Professional Development** (CPD on pedagogy, inclusive practice, curriculum, leadership)
- **Shared Resources** (trust-wide curriculum framework, assessment tools, digital resources)
- **Data-Driven Monitoring** (trust data systems, benchmarking, progress tracking)
- **Collaboration Networks** (subject-specific and phase-specific learning communities)

4.2 Universal Support Allocation (Tier A)

Primary Schools

- 4 days School Improvement Partner allocation per academic year
- Structured visits: Autumn 1, Spring 1, Spring 2, Summer 2
- Annual categorisation review visit
- Headteacher performance management (2 cycles per year)
- CEO visit (1 visit per year)

Secondary and 6th Form Schools

- 6 days School Improvement Partner allocation per academic year
- Structured visits: Autumn 1, Spring 1, Spring 2, Summer 2

- Additional focused visit cycle on secondary-specific priorities
- Annual categorisation review visit
- Headteacher performance management (2 cycles per year)
- CEO visit (1 visit per year)

4.3 Working Alongside Support (Tier B)

Schools identified through categorisation as requiring additional support receive:

- Enhanced SIP allocation (6-8 days for primary; 8-10 days for secondary)
- Targeted quality assurance on identified areas for development
- Lead practitioner peer support from high-performing schools
- Structured inquiry visits on specific school improvement priorities
- Enhanced headteacher performance management support

4.4 Intensive Support Programme (ASIS – Tier C)

Schools identified as requiring intensive intervention receive:

- Dedicated School Support Partner (5 days annual, extendable to 18 months)
- Comprehensive action plan with identified priorities and success criteria
- Enhanced executive oversight and accountability
- Targeted training and professional development
- Budget allocation for improvement initiatives (£5,000 per school)
- Regular review meetings (minimum half-termly) with Director of Education, SSP, Chair of Governors, and Headteacher

ASIS Actions Include:

- Lead practitioner deployment from high-performing schools
- Specialist training (teaching and learning, inclusion, leadership)
- External consultancy (commissioned specialists for identified needs)
- Peer school partnerships (supported placement in high-performing school)
- Enhanced CEO and board visibility and support

4.5 Three-Pillar Framework Assessment

All schools are assessed against three core pillars:

Pillar 1: Leadership

Core Principles: Distributed leadership, moral purpose, strategic vision, quality assurance, professional learning, sustainability

Assessment Dimensions:

- **Leadership Development:** Invest in aspiring leaders through NPQ programmes; promote trust-wide leadership forums; create opportunities for cross-school experience
- **Strategic Vision:** Leaders articulate compelling vision aligned to trust values; clear vision communicated to staff and pupils
- **Quality Assurance:** Evidence-informed decision-making; data literacy and strategic use; regular monitoring and responsive intervention
- **Professional Culture:** Staff progression routes clear; talent identified and developed; professional learning actively promoted; well-being culture embedded

Pillar 2: Professional Practice

Core Principles: Evidence-based practice, cross-school collaboration, curriculum coherence, inclusive assessment, educational research

Assessment Dimensions:

- **Curriculum Design:** Trust curriculum statement developed and used; breadth and balance; engagement with external agencies and specialists; ongoing curriculum review
- **Engagement with Evidence and Research:** Culture of innovation; decision-driven data collection; undertaking and using research to support practice
- **Assessment:** Equitable assessment across phases; effective feedback for learners; personalised approach where needed; assessment drives improvement

Pillar 3: Pedagogy (Teaching and Learning)

Core Principles: High-quality teaching, inclusive learning environment, independent learning, behaviour for learning, creative strategies, cross-curricular learning

Assessment Dimensions:

- **Learning Climate:** Purposeful, supportive learning environment; barriers to learning identified and addressed; positive behaviour for learning
- **Learning Cultures:** Learning which supports and stretches; independent learners; collaboration in learning; respectful relationships; equitable systems
- **Teaching and Learning Quality:** Trust-wide pedagogy model; consistent lesson structure; formative assessment strategies; creative strategies and techniques; learning beyond classroom

4.6 Implementation: Quality Assurance Cycle

Ongoing quality assurance cycle across all schools:

1. **Audit** – Annual categorisation and self-evaluation (SEF)
2. **Reflect and Analyse** – Detailed review against three pillars; identification of strengths and development areas
3. **Implement and Review** – Action planning, targeted support, implementation of improvement initiatives
4. **Evaluate Impact** – Regular monitoring, termly reviews, refining plans based on evidence

Section 5: Specific Strategic Priorities and Implementation

5.1 Teaching and Learning Excellence

Objective: Establish and embed teaching and learning strategy across all schools ensuring high-quality, consistent pedagogy

Implementation:

- Complete rollout of Steplab pedagogy model outlining non-negotiables across all schools (consistent lesson structure, formative assessment strategies, feedback frameworks)
- Establish joint practice development sessions across schools to spread innovative and inclusive teaching methods
- Deploy Teaching and Learning Lead (Laura Cripps – Secondary; Rachel Hughlock – Primary) for professional development and school coaching

- Conduct twice-yearly teaching and learning audit across sample of schools
- Establish teaching and learning communities of practice (primary and secondary phases)

Timeline: Ongoing through 2026-2028 with major rollout completion by July 2027

Success Indicators: 90%+ schools implementing consistent pedagogy model; improved pupil engagement feedback; progress measures trending above national average

5.2 Curriculum Coherence and Innovation

Objective: Develop and embed unified trust-wide curriculum framework ensuring coherence, breadth, and quality

Implementation:

- Finalise trust-wide curriculum statement balancing core content with local adaptation flexibility
- Conduct subject and curriculum leader reviews termly
- Establish curriculum networks (primary and secondary) for peer learning and innovation sharing
- Ensure all schools engage with external agencies (national hubs, specialist organisations) to enhance curriculum breadth
- Develop specialisms across schools to share cross-trust (e.g., STEM, arts, outdoor learning)
- Gather student feedback on curriculum meaningfulness and relevance termly

Timeline: Initial framework completion by end of Summer 2027; embedding through 2027-28

Success Indicators: 100% curriculum framework adoption; evidence of local specialisms developing; student feedback on curriculum engagement positive; improved attainment in curriculum-focused areas

5.3 Data-Driven Improvement and Systems

Objective: Establish and maintain robust, integrated data systems enabling evidence-informed decision-making

Implementation:

- Continue development of centralised data system (coordinated by Trust School Data Lead – Shaun Fishburn)
- Provide training to governors and leaders on data analysis and interpretation
- Conduct termly data review meetings with schools (SIP + Leadership)
- Establish data dashboard for central oversight of progress across schools
- Annual benchmarking against national progress and attainment targets
- Implement standardised assessment and progress tracking across phases

Timeline: System enhancements and training rolled out Q1-Q2 2026-27; ongoing operation

Success Indicators: All schools operating with transparent data systems; 100% leaders confident in data interpretation; termly progress reviews conducted with all schools; central dashboard operational and enabling proactive intervention

5.4 Inclusion and Equity Strategy

Objective: Develop and implement trust-wide strategy ensuring access to exceptional education for all, with particular focus on SEND and disadvantaged pupils

Implementation:

- Finalise trust-wide inclusion strategy (coordinated by Trust Inclusion Lead – Olivia Wernick)
- Ensure access to mental health resources and support for vulnerable students
- Provide training to staff on inclusive practice and SEND support
- Establish inclusion communities of practice across schools
- Conduct inclusion audits and reviews in all schools
- Implement consistent SEND identification and support processes
- Develop specialist roles and expertise across schools for peer support

Timeline: Strategy completion by end of Summer 2027; school-level implementation plans by September 2027; ongoing delivery

Success Indicators: SEND progress tracking showing all pupils accessing appropriate support; inclusion audits showing consistent standards; staff feedback on inclusion confidence improving; vulnerable student outcomes above national average

5.5 Mental Health, Safeguarding, and Well-being

Objective: Ensure comprehensive support for mental health, safeguarding, and well-being across all pupils and staff

Implementation:

- Coordinate with Trust Mental Health and Safeguarding Lead (Holly Wise)
- Deliver trust-wide mental health training (all staff)
- Implement consistent safeguarding audit process (biannual)
- Establish well-being initiatives across schools
- Support schools with incident response and serious case involvement
- Provide specific support for pupils experiencing trauma or adverse childhood experiences
- Regular communication protocols with external agencies (local authority, police, health services)

Timeline: Training rollout Q3 2026-27; ongoing safeguarding audit cycle; continuous support provision

Success Indicators: All staff trained in mental health awareness; safeguarding audit compliance >95%; incident response times appropriate; pupil well-being measures improving

5.6 Leadership Development and Succession Planning

Objective: Build sustainable leadership capacity across the trust ensuring pipeline of leaders at all levels

Implementation:

- Investment in National Professional Qualification (NPQ) programmes for aspiring leaders
- Establish trust-wide leadership forums bringing together school leaders from all three former trusts

- Create opportunities for leadership experience across different school contexts and types
- Identify and develop talent through succession planning process
- Provide experienced School Improvement Partner mentoring for developing leaders
- Support leadership transitions and appointments

Timeline: Ongoing through 2026-2028; NPQ cohorts identified by September 2026

Success Indicators: 10+ staff undertaking NPQ programmes; leadership forums meeting termly; succession planning documentation current; external feedback on leadership quality positive

Section 6: School Improvement Outcomes and Impact Measures

6.1 Progress and Attainment Targets (2026-2028)

All schools will:

- Achieve above national average progress measures
- Maintain or improve attainment against national benchmarks
- Close progress gaps for disadvantaged pupils and SEND students
- Demonstrate improved outcomes in reading, writing, mathematics, and cross-curricular learning

Schools in ASIS (Tier C) will:

- Progress toward "good" Ofsted standard within identified timescale
- Show measurable progress in identified priority areas within 12 months
- Exit ASIS programme within 18-24 months with sustainable improvements in place

6.2 Quality of Teaching and Learning

Measures:

- Teaching and learning audit scores trending upward
- Lesson observation feedback showing improved consistent pedagogy
- Feedback from joint practice development sessions and teaching schools activities
- Student engagement and behaviour feedback improving
- Staff confidence in teaching methods and innovation increasing

6.3 Leadership and Management

Measures:

- Leadership team self-evaluation alignment with external SIP assessment
- Performance management outcomes showing leadership development
- Staff feedback on leadership quality and direction improving
- Succession planning documentation up to date with identified talent
- Leadership forums attendance and engagement high

6.4 Inclusion and Equity Outcomes

Measures:

- Progress measures for SEND and disadvantaged pupils improving

- Reduced suspension and exclusion rates
- SEND support documentation and reviews current and comprehensive
- Mental health and well-being survey scores improving
- Staff confidence in supporting vulnerable pupils increasing

6.5 Central Operations and Systems

Measures:

- School satisfaction survey: 80%+ satisfaction with central team support
- Policy alignment audit: 90%+ consistency across trust
- Data system functionality and accessibility: 100% schools confident in use
- Finance and HR systems: smooth integration post-merger
- Ofsted readiness assessment: central team demonstrating required cohesion and effectiveness

Section 7: Governance and Accountability

7.1 School Improvement Oversight

Trustees and Education Committee: Hold Executive to account for school improvement. Receive regular reports on:

- School progress and categorisation reviews (termly)
- School Improvement Team performance and capacity
- ASIS programmes and outcomes
- Ofsted readiness and inspection feedback
- Progress against delivery plan milestones

Frequency: Monthly Executive-School Improvement Team meeting; termly Education Committee report; annual full Board review

7.2 Accountability to the Department for Education

Progress Reporting to DfE:

- Quarterly update on merger and restructure timelines (2026-27)
- Biannual school performance summary and progress report
- Annual data submission on trust performance and school progress
- Engagement with Regional Director on Ofsted readiness (Summer 2028)
- Response to any formal DfE queries or concerns

7.3 Quality Assurance Internal Processes

School Improvement Team Leadership:

- Regular review of team performance and capacity
- Structured performance management for all SIP and support team members
- Professional development for team members

- Workload management to ensure sustainable delivery
- External challenge and review of school improvement effectiveness

7.4 External Validation

Evidence and Validation Mechanisms:

- Annual audit against Ofsted MAT inspection framework criteria
- External school review (mid-cycle health check for schools)
- MAT readiness review (to be commissioned Summer 2028)
- Engagement with external partners (Teaching School Hubs, CST, regional consultancies) for credibility check
- Inspectorate liaison and readiness assessment (ongoing)

Section 8: Risk Mitigation and Contingency Planning

8.1 Key Risks and Mitigation Strategies

Risk 1: Merger Complexity and Integration Delays

Risk Profile: 3-1 merger spanning three organisations, 30 schools, and multiple staff groups is complex; legal or regulatory delays could impact timeline

Mitigation:

- Experienced merger governance team appointed
- Weekly integration planning meetings
- Regular DfE case officer engagement
- Contingency timeline built into plan
- Clear escalation protocols for emerging issues

Risk 2: Staff Morale and Engagement During Restructure

Risk Profile: Restructure process spanning 18 months could impact staff motivation, engagement, and attrition

Mitigation:

- Transparent communication at all phases
- Meaningful stakeholder engagement in design process
- Genuine incorporation of consultation feedback into plans
- Regular "listening" sessions with staff
- Recognition of staff concerns and fair processes
- Clear timeline and "end date" for change uncertainty

Risk 3: School Improvement Impact During Restructure

Risk Profile: Concurrent merger and restructure could divert leadership attention away from school improvement delivery.

Mitigation:

- Hub-based SLA model maintained to ensure continuity of school support
- Dedicated School Improvement Team independent from merger/restructure project management
- Enhanced SIP allocation to schools requiring support during disruption
- Clear accountability for school improvement outcomes regardless of organisational change
- Additional capacity from lead practitioners and peer school support

Risk 4: Ofsted MAT Inspection Readiness

Risk Profile: If central team integration or school improvement systems not sufficiently embedded by September 2028, Ofsted assessment could be negative

Mitigation:

- Clear phased delivery timeline ensuring 6-month embedding period before inspections begin
- External readiness review commissioned Summer 2028
- Ongoing alignment to Ofsted framework requirements
- Structured preparation and evidence gathering in advance of inspection
- External support and consultancy commissioned if readiness assessment identifies gaps

8.2 Contingency Scenarios**Scenario A: Merger approval delayed beyond September 2026**

- Restructure timeline extends proportionally
- School improvement delivery maintains current level
- Contingency plan developed for alternative integration timeline
- DfE communication emphasising continued commitment to phased approach

Scenario B: School requiring intensive support unable to exit ASIS within expected timeframe

- Extended support period planned (up to 24 months)
- Additional budget and resource allocation reviewed
- External specialist support commissioned
- SIP capacity reprioritised to support improvement trajectory
- Regular monitoring and course-correction of support plan

Scenario C: Ofsted readiness assessment indicates gaps before inspection

- External consultancy commissioned for specific areas of concern
- Accelerated implementation of identified improvements
- Enhanced communication with DfE on remediation plan
- Possible request for inspection deferral if critical gaps remain unfillable

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Section 10: Alignment to Department for Education Priorities and Frameworks

10.1 DfE MAT Merger Guidance Alignment

1. Strategic Clarity

- Clear prioritisation of merger completion and embedding as strategic focus
- Phased, sequenced approach showing capacity planning and realistic delivery
- Explicit acknowledgment that concurrent major change programmes complicate governance and distract from merger embedding

2. Stakeholder Engagement

- Consultation feedback meaningfully incorporated into post-merger restructure design
- Secondary headteachers and incoming trust leaders actively involved in design process
- Clear communication to staff showing genuine engagement with concerns

3. Implementation Capacity

- Dedicated School Improvement Team ensures school support delivery continues
- Experienced merger project leadership appointed
- Resource allocation and timeline realistic given scale of undertaking

4. Integration Feasibility

- Hub-based service delivery model in place and functioning (since September 2025)
- Clear integration approach for centralised operational model
- Governance and policy alignment process mapped

10.2 Ofsted MAT Inspection Framework Alignment (2027-28)

This delivery plan positions Learning Partners to demonstrate:

1. “Cohesion of Central Engine”

- Integrated governance and strategic alignment across unified trust
- Single leadership team with clear accountability and decision-making authority
- Unified systems and processes are accessible and understood by all schools

2. Strategic Direction and Accountability

- Clear school improvement strategy with measurable outcomes
- Regular monitoring and accountability of school progress
- Evidence of central team impact on school improvement outcomes

3. Impact on School Improvement

- School progress data tracking improvement in attainment and progress
- Documented case studies of school improvement journeys
- Evidence of effective intervention and support from central team

4. Systems and Processes

- Auditable financial, HR, and quality assurance systems
- Data systems enabling transparent tracking of progress
- Quality assurance processes rigorous and evidenced

10.3 DfE School Improvement Guidance

- **DfE School Improvement in MATs guidance:** Our approach grounded in research, collaborative practice, and strategic capacity building
- **CST Knowledge Building in MATs:** Evidence-informed practice on trust-led improvement and sustainability
- **Research and Evidence:** Engagement with Teaching School Hubs, research organisations, and best practice exemplars

Section 11: Communication and Stakeholder Engagement Strategy

11.1 Staff Communication Plan

Key Comms:

- Merger is strategic priority; restructure will follow merger embedding
- Staff concerns from consultation are valued and will inform post-merger design
- Clear timeline provides certainty and reduces prolonged change uncertainty
- Phased approach demonstrates strategic clarity and capacity planning
- Post-merger collaborative design involves all trust staff, not just LPAT

Frequency and Engagement:

- Monthly all-staff updates (newsletter, webinar)
- Quarterly town halls (per school type: primary, secondary, central services)
- Half-termly headteacher briefings
- Direct communication to staff in identified development areas
- Union engagement and partnership

Timeline: Monthly communication from February 2026 onwards

11.2 School and Headteacher Engagement

Key Comms:

- Trust is committed to supporting every school to achieve excellence
- Consultation feedback on restructure will directly inform post-merger design
- School Improvement Team capacity and support will continue without interruption
- Headteachers are central partners in post-merger design and implementation

Engagement:

- Half-termly headteacher briefings
- Quarterly leadership forums (primary, secondary)
- Dedicated design sessions for secondary headteachers and incoming trust leaders (Phase 1b)
- Individual school engagement during categorisation visits
- Responsive one-to-one conversations addressing specific concerns

11.3 Governor and Trustee Communication

Key Comms:

- Merger and restructure are transparent, sequenced programmes with clear governance
- Board of Trustees maintains strategic oversight throughout
- School Improvement Team reporting enables transparency and accountability

Frequency:

- Monthly briefing to Trustees (merger and restructure progress – via MTC report)

- Termly Education Committee report on school improvement outcomes
- Annual full board review of strategic delivery and Ofsted readiness

11.4 Department for Education and Regulators

Key Comms:

- Learning Partners is pursuing strategic growth through consolidation
- Phased approach demonstrates mature capacity planning and strategic discipline
- School improvement infrastructure ensures continuous educational excellence
- Alignment to Ofsted MAT inspection framework builds confidence in central operations

Engagement:

- Quarterly updates to DfE Regional Director (2026-27)
- Biannual school performance reporting to DfE
- Annual data submission and statistical returns
- Responsive communication on any emerging issues or changes to plan

Section 12: Success Criteria and Plan Review

12.1 Delivery Plan Success Criteria

By End of Phase 1 (August 2027):

- 3-1 merger completed and legally consolidated
- DfE approval secured and publicly confirmed
- Unified governance structures established and operational
- Policy and system alignment 90%+ complete
- Staff engagement survey showing improved trust identity and reduced fragmentation
- School improvement delivery maintained at or above current levels

By End of Phase 2 (April 2028):

- Integrated operational restructure completed
- All staff appointed to new roles and in position
- New operational structures functioning and delivering school support
- Staff satisfaction >85%
- BAU for school support services during transition – no/ minimal disruption
- 30+ schools operating under aligned school improvement plan(s)

By April 2028 (Ofsted Inspections - MAT):

- Central team demonstrating collaboration and aligned operations
- School progress data showing improvement and trajectory
- Quality assurance systems auditable and effective

- External readiness review confirming adequate MAT inspection preparedness
- DfE feedback positive on integration and improvement delivery

12.2 Ongoing Performance Monitoring

School Improvement Outcomes (tracked termly):

- All schools progress categorisation data
- Progress and attainment measures vs national benchmarks
- School satisfaction with central support
- Teaching and learning quality indicators
- Inclusion and equity outcomes

Operational Excellence (tracked monthly):

- Central team capacity and workload
- System and process effectiveness
- Staff engagement and well-being
- Finance and HR system integration
- Ofsted readiness assessment updates

12.3 Annual Review and Reporting

Annual Review Process:

- May – Collate and analyse school improvement outcome data
- June – Conduct Ofsted readiness assessment
- July – Prepare annual report to Board of Trustees and DfE
- August – Board review of delivery plan progress and identify any required adjustments
- September – Communicate outcomes to schools and stakeholders; confirm next year's priorities

Annual Report to DfE includes:

- Progress on merger/restructure timeline
- School performance summary and progress against targets
- School Improvement Team effectiveness
- Ofsted readiness and any emerging concerns
- Amendment to delivery plan if required

Conclusion

Learning Partners Academy Trust is committed to delivering sustainable, impactful school improvement across our consolidated 30-school organisation. This delivery plan demonstrates:

1. **Strategic Clarity** – Clear sequencing of major programmes (merger embedding, then integrated restructure) showing mature capacity planning and realistic delivery
2. **Stakeholder Respect** – Meaningful engagement with consultation feedback, secondary headteachers, and incoming trust leaders; genuine collaborative design going forward
3. **Continuous Educational Excellence** – Dedication to school improvement and pupil outcomes throughout periods of organisational change; maintained support and challenge to schools
4. **Ofsted Readiness** – Clear pathway to demonstrating cohesive central operations, effective school improvement infrastructure, and unified trust operating model by September 2028
5. **Transparency and Accountability** – Regular reporting to DfE, Board of Trustees, and all stakeholders on progress; honest communication of achievements and challenges

Through this comprehensive, evidence-informed approach, Learning Partners will consolidate three trusts into a unified organisation whilst maintaining and enhancing the quality of educational provision for all pupils. We are confident that by April 2028, we will be well-positioned to demonstrate to Ofsted inspectors a cohesive, effective central engine delivering impactful school improvement across all 30 schools.

Appendices

[Appendix 1: Learning Partners Trust Dozen – Key Performance Indicators](#)

The Trust Dozen outlines the key performance indicators by which Learning Partners schools are assessed:

1. **Ofsted Standard** – All schools maintain or progress toward 'Good' standard
2. **Progress Measures** – All schools achieve above national average progress in reading, writing, mathematics
3. **Attainment** – All schools meet or exceed national benchmarks in key stage outcomes
4. **Inclusion** – SEND pupils and disadvantaged pupils progress in line with peers
5. **Behaviour and Safety** – Low suspension and exclusion rates; positive behaviour culture
6. **Teaching and Learning Quality** – Consistent pedagogy and high-quality teaching evident in observations
7. **Leadership Capacity** – Effective school leadership with clear vision and strategic direction
8. **Staff Development** – Investment in staff progression and professional learning
9. **Curriculum** – Broad, balanced, coherent curriculum appropriate to pupils' needs
10. **Data and Evidence** – Effective use of data to inform decision-making and improvement
11. **Stakeholder Engagement** – Positive relationships with parents, carers, governors, and external partners
12. **Well-being and Mental Health** – Positive pupil and staff well-being; mental health support embedded

Appendix 2: School Improvement Contact Details

Directors of Education

- Kathryn Krynicki (Primary and Inclusion focus) - kkrynickilearningpartners.org
- Helen Gregory (Secondary and Data focus) - hgregorylearningpartners.org

School Improvement Partners – Primary

- Carol Pearce - cpearcelearningpartners.org
- Pip Galton - pgaltonlearningpartners.org
- Additional primary SIP(s) to be confirmed

School Improvement Partners – Secondary

- Curriculum and teaching focused secondary SIP(s) – to be confirmed

Specialist Leads

- Trust Inclusion Lead: Olivia Wernick – owernicklearningpartners.org
- Teaching and Curriculum Secondary Lead: Laura Cripps – lcrippslearningpartners.org
- School Improvement Co-ordinator: Tanya Marchetti – tmarchettilearningpartners.org
- Trust Mental Health and Safeguarding Lead: Holly Wise – hwiselearningpartners.org
- Trust School Data Lead: Shaun Fishburn – sfishburnlearningpartners.org

For general queries, contact: tmarchettilearningpartners.org or kkrynickilearningpartners.org / hgregorylearningpartners.org

Appendix 3: Key References and Guidance

- CST Knowledge Building in MATs: DNA of trust-led school improvement (2024)
- DfE School Improvement in Multi-Academy Trusts Guidance (2024)
- Ofsted MAT Inspection Framework (2027-28 onwards):
 - *“Focus on central engine cohesion, integrated governance, and strategic impact on school improvement”*

School Improvement Strategy 2025-27



Learning Partners

School Improvement Strategy

School improvement is the core business of Learning Partners. Ensuring that successful schools continue to thrive and that schools facing challenging circumstances improve to the benefit of all pupils is at the very heart of what Learning Partners does.

At Learning Partners, we aim to have a sustainable approach, generating and aligning the necessary capacity, commitment, intelligence, processes, and quality assurance models for scalability, all underpinned by a compelling vision for what successful school improvement truly looks like.

We know that our children pass through school once, and so it is beholden on the trust to support our schools in ensuring that this one opportunity delivers excellence. We do this through working with our Headteachers on our school improvement strategy.

Our aim is to deliver impactful and sustainable school improvement to ensure that every pupil is educated in a great school. Our approach is grounded in key research and think pieces:

CST Knowledge Building in MATs

DNA of trust-led school improvement - 2024-04-25.pdf

DfE School Improvement in MATs

We will use our network and expertise across the Trust to enable successful schools to maintain and build further success, develop and adapt to the changing educational landscape, and provide support and opportunities for development wherever it is needed. This document aims to illustrate how we will work together with you and your teams.

The following pages show why we do, what we do and how we ensure our children get the very best educational experience in a Learning Partner school.

We live out our vision and values through the day-to-day interactions we have within the organisation. Schools are supported to do this through the School Improvement Framework. Every Learning Partner school is given a core offer of support with bespoke support and challenge offered in addition.

We recognise that to be highly effective we need to work with partner agencies outside of the organisation. We welcome support and challenge from a variety of individuals and organisations at a local, regional, and national level. We gain capacity for school improvement by working alongside SAfE, NGA, The Key, Ofsted, Teaching School Hubs, Maths and English Hubs in the Southeast Region and CST. When undertaking school reviews, an appropriately skilled team is put together to gain a rounded view of a school. Learning Partners also engages with other Trusts to support MAT to MAT evaluation and school improvement support.

Trust vision and mission

Our Vision



Leading schools
where children thrive

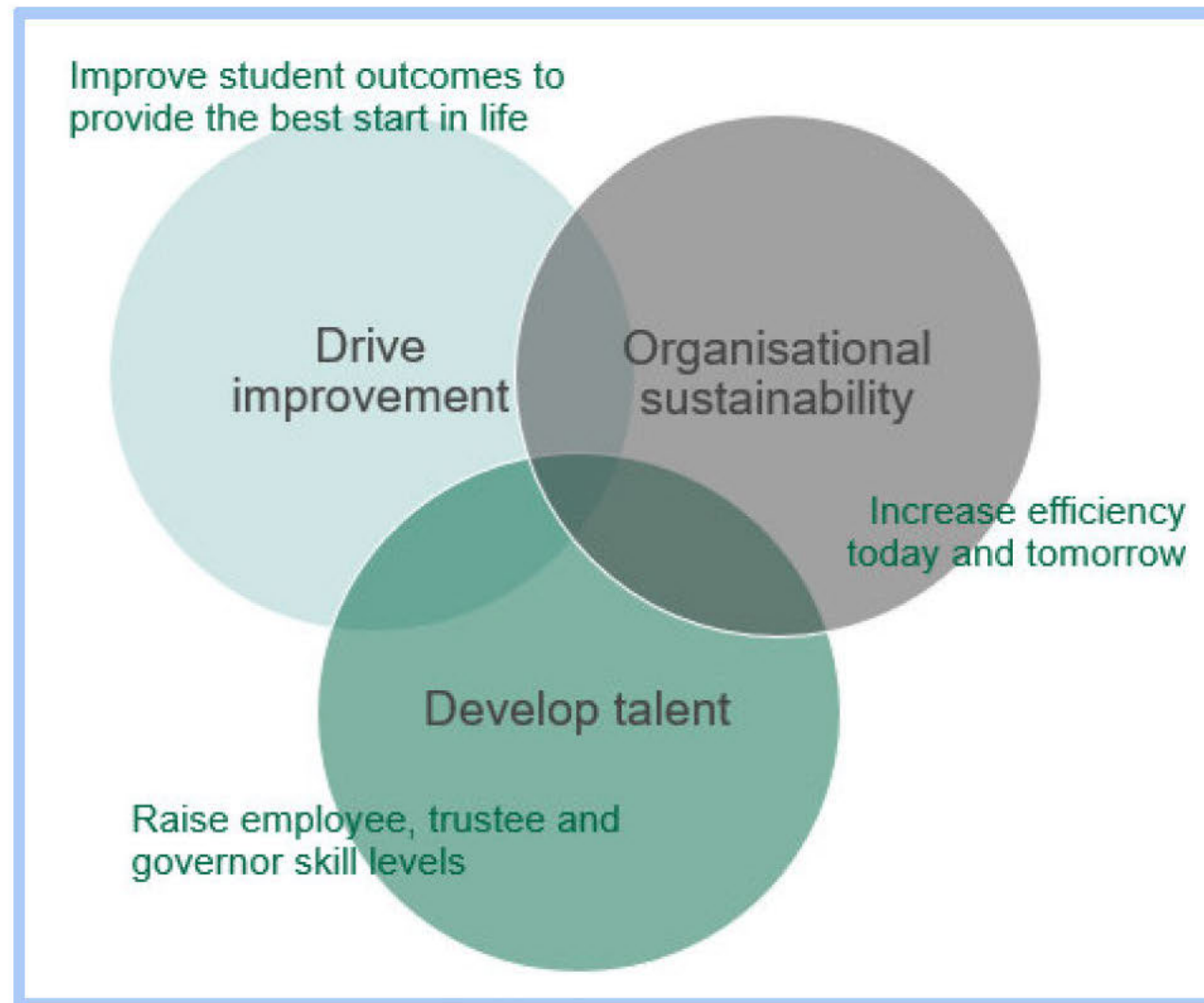
Our Mission



Working together to make
schools better for children

Strategic Themes 2025-27

This model seeks to address key challenges, leverage, collaboration and sustain improvement across all schools in the trust



Fundamental components of Learning Partners School Improvement Strategy



What do we want for our schools?

Ensure all schools achieve above national progress goals and performance strengthens further against national benchmarks.

Ensure all schools meet at least the 'Expected' standard as set by Ofsted across all key areas.

For greater detail, please view our Trust Dozen (Appendix 1) which outlines the key performance indicators of our organisation

We want to create an environment where all children feel they belong.

Our trust operates a continuous school improvement model: audit, reflect, and analyse, and implement and review. Often this revolves around the academic year; sometimes systems require more immediate termly focus cycles; occasionally objectives require two or three year timescales in order to be effective, necessity dictates timescale. No child is left with substandard provision.

The foundation of the MAT improvement model is built on a shared vision: to deliver high-quality education across all schools while respecting the unique context of each school. Core principles include:

- Equity: Ensuring all pupils, regardless of background, have access to exceptional education.
- Collaboration: Fostering a culture of shared learning and practice across the trust.
- Accountability: Maintaining transparency and consistent standards to ensure sustainable progress.
- Innovation: Encouraging schools to innovate and adapt to meet the needs of their pupils.

Learning Partners Framework for Highly Effective Schools

Our framework is built around three pillars of leadership, professionalism and pedagogy. We use these as a scorecard for our schools to help identify strengths, focus on the challenges and prioritise resources. In this way we can adapt and intervene in our schools effectively and proactively support school leadership teams.

Leadership			
Leading with moral purpose Trust and school aligned vision and values which promote inclusion and social justice. Resilience for all Commitment to use evidence to drive decision making.	Professional Learning Staff progression routes identified and promoted. Professional development actively promoted. Cross school and trust collaboration Educational research is encouraged	Quality Assurance School attached improvement partner. Self-evaluation shared and promoted. Annual agreed categorisation including monitoring and target setting. Strategic use of data and benchmarking (fft, 4Matrix, ALPs, IDSR)	Sustainability Talent spotting and management Well-being culture Championing inclusivity and diversity
Professional practice			
Curriculum Design Trust developed and agreed curriculum statement used by all. Ongoing curriculum review Breadth and balance. Personalised approach for learners who need this.	Engagement with stakeholders Learners, staff, governors and trustees are actively engaged in school improvement. Positive, embedded relationships with all Engagement with outside agencies and partners at local and national level	Engaging with evidence and research Culture of innovation Undertaking and using research to support curriculum development. Developing specialisms to share cross trust	Assessment Decision driven data collection Effective feedback for learners Equitable assessment cross phase Assessment drives improvement for learners
Teaching and Learning			
Learning climate	Learning cultures	Learning Behaviours	Pedagogy

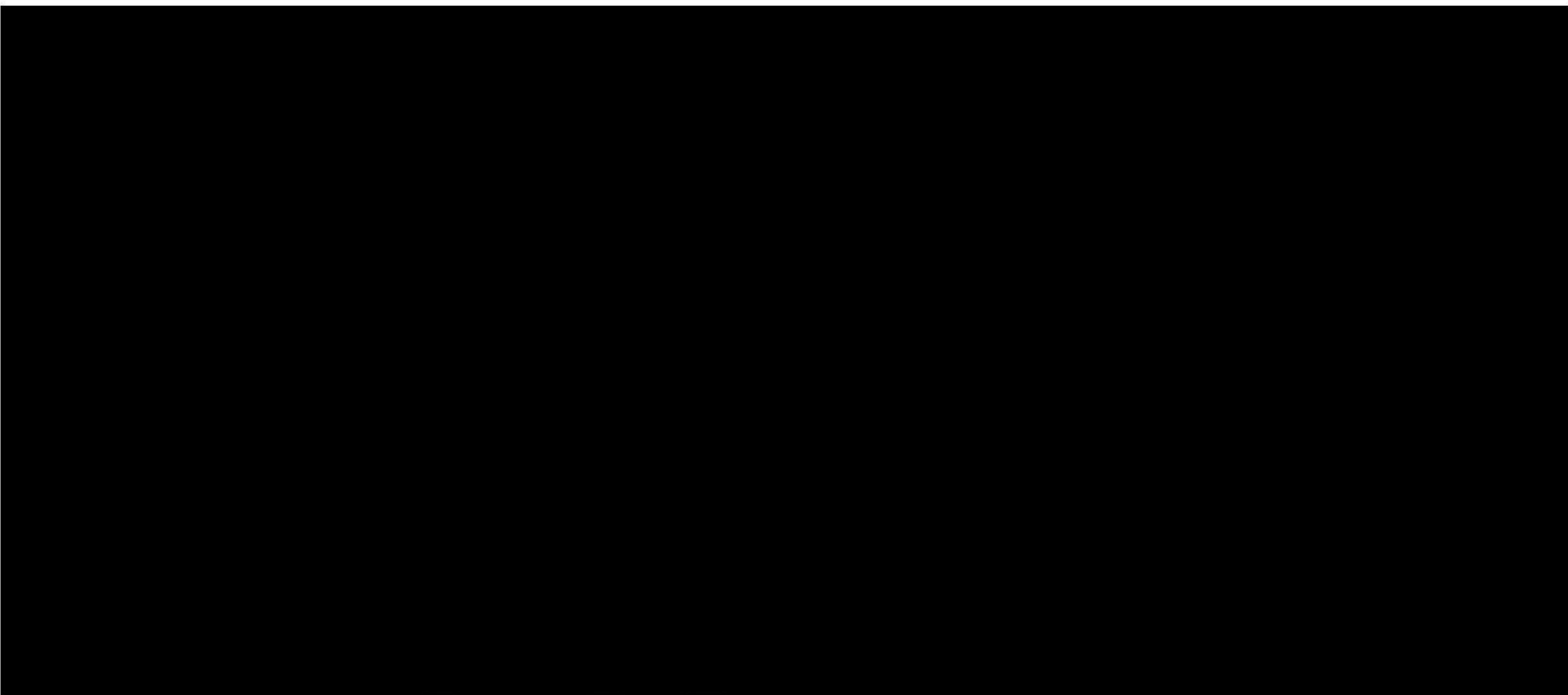
Purposeful learning environment. Respectful relationships for all. Learning which supports and stretches. Learning beyond the classroom	Identifying and addressing barriers to learning. Using the very best practice identified to promote the best teaching and learning. Independent learners who are supported through the next stage of education.	Positive behaviour for learning Equitable behaviour systems which reward and flex Clear structure to lessons	Trust wide pedagogy model developed by practitioners. Effective assessment strategies Collaboration in learning Creative strategies and techniques
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What does implementation look like at Learning Partners?

What?	How?
Leadership Development	Develop leadership pipelines by investing in aspiring leaders through NPQ (National Professional Qualification) programmes. Promote trust-wide leadership forums/networks to share strategies and address systemic challenges. Find opportunities for leadership experience in different settings. Create opportunities to work with experienced School Improvement Partners.
Teaching and Learning Excellence	Establish a Teaching and learning strategy through implementation of Steplab outlining non-negotiables across all schools (e.g., consistent lesson structure, use of formative assessment). Use joint practice development sessions to spread innovative and inclusive teaching methods.
Curriculum Coherence	Continue to drive trust-wide curriculum statement that balances core content with the flexibility for local adaptation. Regularly review curriculum implementation through subject/curriculum leader reviews and student feedback.
Data-Driven Improvement	Continue to develop the centralised data system for benchmarking and tracking progress across schools. Provide training to governors and leaders on data analysis to inform decision-making.
Inclusive Practices	Develop a trust-wide inclusion strategy to support SEND (Special Educational Needs and Disabilities) and disadvantaged pupils. Ensure access to mental health resources and support for vulnerable students.

Core Offer to all schools

All schools have a core offer for school improvement and are supported by the Learning Partners School Improvement Team. All team members are suitably qualified and experienced as approved by the Executive and Trust board.



Categorisation and additional support

All Learning Partner schools undertake a joint categorisation visit towards the end of the summer term. This is to celebrate what has gone well, where priorities for the next academic year will lie and where the school and trust leaders believe the school to be at in terms of achieving the strategic aims.

This takes place in collaboration with SIPs, school leaders and governors. It is acknowledged that schools go through varying degrees of capacity at any given time and strategic aims can be out of sync due to unforeseen events (i.e., pandemic) or operational issues taking precedence. The School Improvement Team will identify swiftly which, if any, schools require Additional School Improvement Support (ASIS). Once a school has been identified as requiring additional school improvement support, an action plan is written and agreed along with timescales and costings. The plan is reviewed at least half termly alongside the SIP, Director of Education, school leaders and governors. The length of time a school is on an ASIS plan may vary depending on the needs identified. The aim is always for rapid improvement. The trustees of the Education committee hold the Executive to account for school improvement and regular reports are shared with the committee as per the annual meeting cycle. The School Improvement Team meet at least termly with the CEO to discuss each school in detail.

Inspection

Learning Partner schools can expect full support from Trust colleagues before, during and after inspection. Schools should notify the School Improvement Team as soon as possible so that they are able to mobilise support and help arrange meetings. The team can be onsite during the inspection and will support in any way possible. The School Improvement team will support the headteacher and governors in understanding Ofsted's framework and ensuring compliance with its expectations.

Incident support

At any time, schools who require support should get in touch. Every now and again, incidents occur which require additional help. The Trust Inclusion lead is available to support with any incidents which may involve learners with additional needs or safeguarding concerns. The schools are issued with a flow chart showing how to access support. Many incidences in schools often overlap i.e. classroom issues directly linked to HR concerns. Please contact the Director of Education for any advice required.

New schools joining the Trust

A baseline assessment is undertaken during the due diligence process to establish overall school performance against national benchmarks and Trust KPIs. A review of published data together with the school's latest in-year data is undertaken along with a review of the school improvement plan and latest

SEF. All joining schools will also have an onsite school review undertaken by the School Improvement Team. The Trust will evaluate whether a broad and balanced curriculum is in place, that is effective and appropriate. All schools joining the Trust will be welcomed into the collaborative family with a role in supporting school improvement across the Trust. Where a school has been identified as a capacity taker through the due diligence process, the Trust will use its central capacity to support rapid school improvement through its ASIS programme. In addition, if and when appropriate, the Trust will commission support from other MATs and individual specialists in order to take swift action and implement strategies to make a positive impact on educational outcomes.

Three-Tiered Framework for School Improvement across Learning Partner schools

On top of our core offer and principles, our schools are part of our three-tiered framework

A. Universal Support (Core Offer All Schools)

Goal: Build capacity and maintain high standards across all schools.

- **Professional Development:** Centralised CPD sessions on pedagogy, inclusive practice, curriculum development, and leadership.
- **Shared Resources:** Develop and implement a trust-wide curriculum framework while allowing contextual adaptation.
- **Data-Driven Monitoring:** Use trust-wide data systems to track performance trends in attendance, suspension, attainment, and progress.
- **Collaboration Hubs:** Establish subject- or phase-specific networks for staff to share expertise and resources.

Working Alongside Schools with a Core Offer

Primary Phase Schools	Secondary and 6 th Form Phase Schools
An allocated School Improvement Partner and Director of Education)	An allocated School Improvement Partner and Director of Education
4 days of SIP to provide quality assurance and support/ advice related to the strengths and areas for development of the school as identified by school categorisation, SEF and the SDP. Allocation of these 4 days will be decided on between the HT, Director of Education and SIP.	4 days of SIP to provide quality assurance and support/ advice related to the strengths and areas for development of the school as identified by school categorisation, SEF and the SDP. Allocation of these 6 days will be decided on between the HT, Director of Education and SIP.
An example of allocation:	An example of allocation:
Visit 1 (Autumn 1) attended by Director of Education, SIP, COG and HT	Visit 1 (Autumn 1) attended by Director of Education, SIP, COG and HT

School Needs Review: Broad standards review. Discussion re SDP key priorities for the year, Learning Walk. Plan school improvement work. Visit 2 (Spring 1): Attended by SIP. Broad standards review. Discussions re progress with SDP priorities. Identification of Inquiry Visit to support and measure impact of work on specific SDP priority or looking at a potential area for improvement for next year. Consideration of peer support for inquiry visit. Discussions around SIP processes Visit 3 (Spring 2): Peer inquiry visit to explore progress with an SDP/Trust priority or to support SEF process Visit 4 (Summer 2): Attended by Director of Education, SIP, COG and HT. Review of the year. School Annual Summary Review. Set future direction.	School Needs Review: Broad standards review. Discussion re SDP key priorities for the year, Learning Walk. Plan school improvement work. Visit 2 (Spring 1): Attended by SIP. Broad standards review. Discussions re progress with SDP priorities. Identification of Inquiry Visit to support and measure impact of work on specific SDP priority or looking at a potential area for improvement for next year. Consideration of peer support for inquiry visit. Discussions around SIP processes Visit 3 (Spring 2): Peer inquiry visit to explore progress with an SDP/Trust priority or to support SEF process Visit 4 (Summer 2): Attended by Director of Education, SIP, COG and HT. Review of the year. School Annual Summary Review. Set future direction.
Line Management – minimum of 3 visits a year (incorporated into other meetings or in addition to if required)	Line Management – minimum of 3 visits a year (incorporated into other meetings or in addition to if required)
CEO visit – one visit per year to be part of the SIP visit programme.	CEO visit – one visit per year to be part of the SIP visit programme.
Headteacher Performance Management (October, March)	Headteacher Performance Management (October, March)
<i>Standards review – Term 1 and 2 (unvalidated data at statutory data points and standardised data for all other year groups) Attendance. (As part of the SIP day allocation)</i>	<i>Standards review – Term 1 and 2 Year 11, PP, SEND & attendance. (As part of the SIP day allocation)</i>
A bi-annual Safeguarding audit and support with biannual Surrey audit.	A bi-annual Safeguarding audit and support with biannual Surrey audit.
Christian Distinctiveness Development Visit for LPCAT schools	Christian Distinctiveness Development Visit for LPCAT schools
Half termly Headteacher meetings to support the leadership and implementation of Trust and school strategic priorities.	Half termly Headteacher meetings to support the leadership and implementation of Trust and school strategic priorities.
Offer of an external review of an identified specific area of focus or health check mid way through the OFSTED cycle.	Offer of an external review of an identified specific area of focus or health check mid way through the OFSTED cycle.

Additional support, collaboration and capacity giving opportunities will be identified during the School Needs Review visit (1st SIP visit)

Throughout the year, the Education team will be available to you.

In addition we will support schools in the following ways:

- Annual CPD offer
- Trust conferences
- Headteacher residential conference
- Education technology support
- Governance training and support
- Opportunities for peer review
- Leadership coaching
- Leadership training
- Attendance support
- Inclusion support
- Safeguarding Hub and DSL supervision
- Subject networks
- Moderation meetings
- Inclusion networks
- Subject/departmental reviews as needed or requested
- Deputy Head meetings
- Teaching and Learning Group meetings
- OFSTED support
- Induction
- School reviews on a rotational basis according to need
- Leadership development programmes and links to post graduate study
- Partnership work with South Farnham SCITT provider to support teacher training across primary and secondary schools

Categorisation of schools

Our school categorisation model aims to draw out an accurate diagnosis of where each school sits within its own school improvement journey. It is designed to be completed collaboratively. It will help us with the identification of support from the school improvement team alongside capacity giving and capacity receiving potential. The Categorisation visit occurs in the summer term as part of the School Improvement Core offer.

Significant Strengths	Strength	Additional Support
Stakeholders combine powerfully to create a consistently high performing school. This is an excellent school with the capacity to further its own improvement journey; to support others in their journey and add capacity to the Trust Education team and strategy. These schools will work with the LP core School Improvement offer.	This is a great school that is developing over time with many aspects being high performing. There is some capacity to support other schools. These schools will work with the LP core School Improvement offer	This is a school with some significant weaknesses and requires rapid improvement. Leaders may be working to improve foundational aspects of the school simultaneously. There may be some areas of emerging strength which may need further embedding. Schools in this category will be supported through the Additional School Improvement Support Programme (ASIS) (A school may also be developing well in some areas)

B. Targeted Support (Schools Requiring Improvement as judged by the School Improvement team)

Goal: Intervene early to address weaknesses in performance or governance.

- **Rapid Diagnostic Reviews:** Conduct assessments to identify the root causes of underperformance.
- **Coaching and Mentoring:** Deploy trust specialists or senior leaders from within Learning Partner Schools to mentor and coach staff in key areas (e.g., teaching quality, behaviour management).
- **Intervention Plans:** Co-develop detailed, time-bound school improvement plans with clear milestones.
- **Peer Reviews:** Pair underperforming schools with high-performing schools for intensive collaboration.

C. Intensive Support (ASIS Additional School Improvement Support for a school judged to be requiring significant support at a point in time)

Goal: Address significant challenges, such as but not limited to: declining outcomes, poor leadership, inconsistent quality of teaching; governance, or financial instability.

- **Leadership Support:** Appoint interim leaders or deploy executive heads or leadership support from the MAT or beyond the organisation if appropriate.
- **Enhanced Governance:** Strengthen local governance through additional MAT oversight or governance training.
- **Financial Recovery Plans:** Work closely with the Learning Partners central finance team to ensure efficient use of resources and compliance.
- **Bespoke CPD:** Tailor professional development for areas of acute need, e.g., safeguarding or curriculum planning.

Additional School Improvement Support (ASIS) Programme

Programme of Support ASIS Schools

Trust offer	How this looks in school
Categorisation visit	Categorisation visit identifies that this is a school with some significant weaknesses and requires rapid improvement. The Categorisation meeting outcomes will be shared with the Trust Action Committee. The Trust Action committee will allocate a Director of Education to oversee the ASIS programme.
Director of Education allocated to work with the school	The Director of Education will visit the school to gain a full understanding of the needs. The Director of Education will then look to appoint a well-matched School Improvement Partner. This will most likely be a Headteacher from another Learning Partners school.
School Support Partner (SSP) appointed	A School Support Partner will be appointed who is well matched to the needs of the HT and to the needs of the school. The School Support Partner will work alongside the HT to secure improvements at the school. The School Support Partner will be allocated 5 days to work with the school across a 12-month period. (In exceptional circumstances, the programme may extend to 18 months. SSP's can choose to use their 5 days in smaller hourly or half day visits across the year.
Initial ASIS meeting	The Director of Education, School Support Partner, Chair of Governors and Headteacher will meet to discuss the priorities for improvement and to begin to form a plan which will be in place for an initial period of 12 months. Following the meeting, the School Improvement Partner will draw together an action plan which will be shared. The action plan will be completed using the ASIS Action Plan template and will identify relevant training and peer support from schools with particular strengths.
ASIS Action Plan	The School Support Partner will write the ASIS Action Plan to include key milestones, training, support and any costs involved- school leaders will be involved with this. A budget of £5K will be allocated for additional training support, this funding can be

	used to secure bespoke training/coaching. It may be appropriate to deploy wider members of the School Improvement Team, Lead Practitioners or external consultants to support the school. The Director of Education will approve the plan. The Headteacher and School Support Partner will implement the plan with the support of others.
Half termly ASIS review meetings	Review meetings will be held half termly to review progress with the implementation of the ASIS Action Plan. Meetings will be attended by Director of Education, School Support Partner, Headteacher and Chair of Governors. Meetings will be led by the Director of School Improvement. The Headteacher and SSP will report on progress. An assessment will be made at each meeting with regards to the progress towards meeting the key aims of the ASIS Action Plan. At the end of the 12-month period, a decision will be taken as to whether to extend and modify the ASIS plan for a further 6 months. Full transparency and accountability is shared with trustees.

Expectations of the School Support Partner in ASIS programme

Attend an initial planning meeting for the allocated school with the Headteacher and the Director of Education
Produce an action plan in consultation with the Headteacher within 2 weeks and submit to the Director of Education for approval.
Prepare and submit a written update of progress and attend 4 Additional School Improvement Support (ASIS) meetings throughout the year
Update action plan as needed throughout the year.
Provide any intervention work highlighted on the action plan and provide feedback on progress and impact to the Director of Education
Attend Learning Partner briefing as necessary

Financial Support for ASIS Schools

2 Streams of Funding: Monitoring Work and Intervention Work	
Monitoring Work – This fund is for 5 visits over the academic year, costed up to £500 per day	Intervention work up to £5K : Support for school as discussed with School Support Partner. This will include the direct intervention work which may also be undertaken, as well as the support from other providers and purchase of additional resources.

1 day supporting the action planning, developing a support plan and brokering support	Additional leadership support from SIP (above 5 days oversight and brokerage)
	Other leadership support (for example for middle leaders/leadership development programmes) Staff secondment where needed
	Governance support – LLG and trust support where needed
	Teaching and Learning Support -Steplab/monitoring/trust brokered expertise
	Curriculum support/challenge – trust lead on teaching and learning onsite
	Behaviour support -brokered through trust inclusion and outside experts

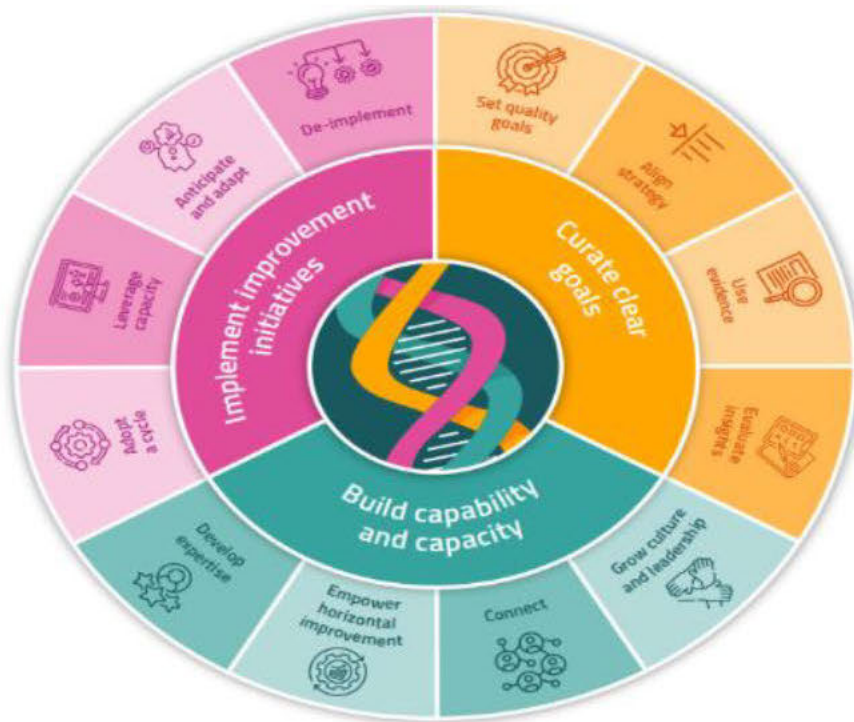
Review Meetings for ASIS Schools



The Conceptual Model as below:

The conceptual model consists of three strands:

- I. Curate clear goals. This strand is about defining clear purposes, strategies & goals so you know what you're aiming for and how you how you plan to get there.
- II. Build capability & capacity. This strand is about shaping the people, culture & capacity within the organisation, in order to create the conditions for sustainable improvement.
- III. Implement improvement initiatives. This strand is about the ongoing process of implementing improvement, iterating and refining as plans are enacted.



What does this look like in Learning Partners Schools?

Curate clear goals

Component	In more detail	Examples of this in practice	When will this happen at LP?	Who will be involved?
Set quality goals	Define the quality the trust and the school is aiming for. Be specific about the goals needed to achieve this.	- What the school improvement model/strategy says (explicitly or implicitly) is effective practice. - Codifying what effective practice looks like in schools & classrooms.	CEO visit Director of Education visits Performance Management meetings Peer visits Headteacher meetings	Trustees CEO Director of Education Headteacher

		What the school articulates, for example through job descriptions or a school prospectus, about its aims.		
Align strategy	Ensure some alignment between school improvement objectives and wider trust strategy	- Embedding wider trust improvement objectives into school level improvement plans. - Having a clear strategy for what is determined as a trust and where improvement planning sits locally, and why. - Having clear & coherent improvement goals & strategies that are understood by all.	Headteacher meetings Director of Education visits	Trustees CEO Director of Education Headteacher
Use evidence	Use evidence to identify the actions most likely to build momentum in the desired direction	- Building evidence into improvement models & strategies through School Improvement Cycle visits - Staff research reading groups / subject networking groups - Evidence/research from across the Trust and beyond through peer working.	School Improvement Cycle Visits Visits to other schools within the Trust Visits to other schools beyond the Trust External facilitators to support knowledge building and information gathering.	Director of Education Peer Headteacher visits Headteachers Network groups Lead practitioners External consultants / facilitators.
Evaluate insights	Use quality evaluative tools to understand the performance of schools and the trust	- Using trust peer review to identify strengths & areas for improvement. - EG Using a common assessment system for reading at Year 7, to allow comparisons across the group.	School improvement cycle visits including Director of Education and Peer Headteacher review. SEF processes in school Sharing whole trust data analysis	Director of Education School Improvement Team including Data Analyst Headteachers

- Using Bromcom to provide insight on where performance is stronger/weaker to inform strategy & deployment.

Build Capability and Capacity

Shaping the people, culture, and capacity within the organisation to create the conditions for sustainable improvement

Component	In more detail	Examples of this in practice	When will this happen at LP?	Who will be involved?
Develop expertise	Put expertise and professional learning at the heart of improvement.	• Prioritising CPD within improvement plans. • Encouraging teachers to be part of subject communities. • Investing in high quality leadership development programmes for new leaders.	School INSET days Trust INSET days Peer visits Networking sessions Headteacher meetings Deputy Head meetings T and L meetings SIP visits Coaching visits	Central team staff Headteachers School leaders All teaching staff Host schools
Empower horizontal improvement	Improve practice across a group of schools simultaneously, rather than just 'one school at a time'.	• Trust-wide subject networks & CPD. • Setting shared improvement priorities across the trust. • Bringing together subject leaders across the trust to develop and/or align the curriculum.	Trust INSET days Peer visits Networking sessions Headteacher meetings Deputy Head meetings T and L meetings SIP visits Coaching visits	Central team staff Headteachers School leaders All teaching staff Host schools

Connect	Build connections across the organisation.	• Ensure staff don't work in silos by establishing working groups on specific issues. • Holding whole-trust conferences to support improvement. • Participating in professional networks and initiatives beyond the school/trust	Key priority working groups Networking groups Trust INSET days Peer visits Links to SAFE and wider networking groups.	Central team staff Headteachers School leaders All teaching staff Host schools
Grow culture and leadership	Establish a culture where leadership and teaching can flourish.	• Being explicit about 'how we do it here' (whether at trust or school level). • Consciously curating the leadership behaviours that are valued through mentoring & coaching. • Codifying standards of classroom behaviour and explicitly teaching these to children.	Identify Trust priorities and outline 'This is how we do it here'. Develop a sense of 'aligned autonomy' around key priorities.	Central team staff Headteachers School leaders All teaching staff Host schools

Implement Improvement Initiatives

The ongoing process of implementing improvement, iterating, and refining as plans are enacted

Component	In more detail	Examples of this in practice	When will this happen at LP?	Who will be involved?
Adopt a cycle	Adopt the behaviours that drive implementation (Engage, Unite, Reflect). Do	Embedding EEF Implementation guidance in improvement initiatives.	School Improvement Cycle (see below) including peer review, inquiry visits, SEF visits	CEO Headteachers Directors of Education

	this whilst tending to contextual factors and using a structured but flexible implementation process: Explore, Prepare, Deliver, Sustain).	- Establishing an improvement cycle that allows for evaluation. - Providing time for staff to reflect on practice.		
Leveridge capacity	Match improvement initiatives with capacity to deliver.	- Deploying expert teachers from a central team to support subject teaching. - Deploying into a school, leaders who have prior experience of 'turn around' in the trust. - A budget to support improvement initiatives across the trust.	Directors of Education work alongside key staff in school. 'Additional Support Improvement Support' (ASIS) programme deployed (5K budget) Peer support deployed Lead Practitioners deployed	CEO Directors of Education Headteachers Senior and middle Leaders Lead Practitioners
Anticipate and adapt	Know what's likely to cause failure and how you will spot it. Learning from it and adapting or ejecting the failing action.	- Drawing on experience to anticipate likely implementation challenges. - Evaluating & adapting curriculum plans. - Establishing key metrics and milestones that will indicate the path to success.	Create an implementation plan with key milestones identified. Learn from the experiences of others (eg from early adopters or pilot projects)	Directors of Education Headteachers CEO
De-implement	De-implement initiatives that are not effective, or less effective than alternative options.	- Reviewing the opportunity cost of low impact teaching initiatives. - Reducing teacher workload. - Having a 'one in, one out' policy when introducing new initiatives.	Use SEF visits and inquiry visits to establish 'is it having an impact?' If not, stop doing it.	CEO Director of Education Headteachers School Improvement Team Senior Leaders

		What will we stop doing in order to implement this?		
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Attachement 4

Fullbrook - ASIS Case Example – DfE Submission



Fullbrook School was identified as an Additional School Improvement Support (ASIS) school following a full analysis of data and a Teaching and Learning Review visit. The School Improvement team identified concerns around:

Progress and attendance of PP students
Progress and attendance of SEND students
Outcomes for the higher ability children

Levels of exclusion, suspensions and lesson removals

The annual teaching review observed that whilst progress was noted in the key areas, there needed to be an acceleration of strategy.

A series of assisted self-evaluation activities took place leading to a decision to place the school on the Learning Partners ASIS programme. Key elements of the programme include:

- A co-constructed Action Plan written by the Director of Education, the Head teacher and the School Support Partner. The plan identifies three key priorities:
 - Development of inclusive teaching strategies
 - Culture and Connections
 - Transformational Leadership.
- A Professional Development programme sits alongside the plan and includes Consultant and peer support from our Trust team:
 - Weekly support from The Trust Teaching and Learning Secondary Lead
 - Seconded Teaching and Learning support from a Deputy Head from a Learning Partners School - 1 day a week
 - Bespoke attendance support from our Trust Attendance Lead,
 - Deployment of our Lead Practitioner for English
 - Deployment of our Lead Practitioner for reading
 - Allocation of A School Improvement Partner to work alongside the Headteacher
 - A full Attendance Audit
 - A full Safeguarding Review
 - Implementation of StepLab across the school
- Termly ASIS review meetings to assess progress and view accountability
- Dedicated Trustee support.

In addition to the core offer on the ASIS support programme, we have supported Fullbrook School in securing:

- A new Headteacher
- A reformed Leadership Structure
- An interim Chair of Governors (LLG) and a restructure of the Governing Body

- Financial advice and support

Additional support which comes as standard from the Trust includes:

- Subject networks
- Attendance networks
- SENCo networks
- Safeguarding support
- Support for leaders at all levels
- A comprehensive CPD programme

We anticipate that the ASIS programme will last for 18 months before a graduated withdrawal of support.

Attachement 5

Pond Meadow School Transfer to Learning Partners Academy Trust

Timeline for DfE Submission - February 2026

Executive Summary

Per DfE recommendation, this paper outlines the planned shared commitment and timeline for Pond Meadow School's (PMW) transfer from to Learning Partners Academy Trust (LPAT). The timeline has been agreed by LPAT and PMW to ensure a structured and collaborative transfer process, considering capital works and satellite provision projects.

Milestones and Timeline

Phase 1: Operational Planning (January 2026 - August 2026)

January 2026 - LPAT/PMW Strategic Discussion

- Agreement reached to phase transfer to March 2028 per DfE guidance
- Key milestones programme and timeline confirmed

February 2026 & ongoing - LPAT Inclusion Works throughout the timeline via SLA

- Cross-timeline inclusion strategy – ongoing discussion/ planning phase
- Needs analysis for inclusive practices across LPAT

March-May 2026 - Service Level Agreement (SLA) - Education Services

- SLA for education services, CPLD etc agreed and signed
- Scope of shared services defined including school improvement, curriculum support etc
- Financial arrangements and service delivery mechanisms confirmed

August 2026 - New Build Works Completion (Scheduled)

- New build construction completed
- Final inspections and snagging agreed
- Health and safety compliance verification
- Handover to school – open facility

Phase 2: Infrastructure Development (September 2026 - December 2026)

September 2026 - Roof Replacement Works (Scheduled)

- Roof replacement project begins
- Progress monitoring to ensure timeline compliance
- Regular health and safety site review
- Contract/ warranty docs to include novation clause.

Phase 3: Expansion and Preparation (January 2027 - December 2027)

January 2027 - Satellite Site "Pond Meadow 2"

- Satellite provision site planned launch date
- Monitoring and evaluation systems activated

Project works to commence 2027 - Pre-Transfer Prep

- Financial, legal, and operational pre-alignment support
- Staff consultation and TUPE planning
- Stakeholder engagement (parents, community, local authority)
- Commercial transfer agreements drafted
- Lease and asset transfer review
- Trust board approvals
- Governance planning

Phase 4: Transfer Formalisation (January 2028 - March 2028)

January 2028 - SAT to MAT Transfer Form Submission to DfE

- Completed transfer application submitted to DfE
- Confirmation of compliance with DfE requirements
- DfE project lead/ case officer assigned
- All required documentation provided:
 - Academy transfer application form
 - Due diligence reports completed
 - CTA & SFA
 - Stakeholder consultation completed

January - March 2028 - DfE Review and Approval Process

- DfE/ RD review transfer application
- Regions group review and decision
- Trust agreement letters issued to both trusts
- Final documentation preparation:
 - Master funding agreement adopted
 - SFA submitted and approved
 - DoNV/ TR5 executed
 - Banking and payment information aligned
- Legal completion/ transfer (all docs executed & approved by DfE for SoS approval)

March 2028 - Proposed Transfer Completion

- Secretary of State (SoS) approval received
- Academy order issued
- Legal transfer confirmation
- PMW formally joins Learning Partners Academy Trust
- Pond Meadow Trust closure/ cessation
- 12-mos post transfer support begins

Governance

Governance Level	Responsibilities
LPAT Board of Trustees	Strategic oversight, final approval decisions
PMW Local Governing Body	Consultation, due diligence support, transition planning
Project Steering Group	Operational coordination, milestone monitoring
DfE Project Lead	Regulatory approval, compliance verification

Communication and Stakeholder Engagement

Throughout the timeline, LPAT and PMW will maintain regular communication with:

- DfE project lead/ Case officer (Avani Chokshi)
- LPAT and PMW trustees and governors
- Staff and Parents at both SAT & MAT
- SCC/ West Surrey/ East Surrey (Satellite site)
- Third parties

The collaborative approach adopted by LPAT and PMW, combined with the strategic timing of the formal transfer application in January 2028, positions the transfer for success and ensures compliance with all DfE requirements.

Attachement 6

MAT Merger Programme Plan – Target Transfer Date 1 January 2027

1. Key Assumptions and Milestones

- MAT to MAT Merger form submitted: **19th December 2025**
- Steering Group agreed proposed January 2027 3-1 merger target date: **12th February 2026**
- Regional Director (RD) decision on MAT Merger form scheduled: **25 March 2026**.
- Target legal completion / transfer date 3-1 merged trust: **1 January 2027**.
- Equity Articles agreed in principle and with DBE solicitors for finalisation.

High-Level Milestones

Period	Milestone
Feb–Mar 2026	RD decision on MAT Merger form; (recommendation to approve advised), DfE confirm in-principal approval.
Mar–Jun 2026	Finalise governance model, vision & values, equity articles, executive agreed, project & education team appointed, diocesan and site arrangements planned. Stakeholder consultation commences.
May–Oct 2026	TUPE and staff consultation; risk profiling and management; policies and systems alignment planned.
Sep–Dec 2026	Statutory/completion documentation, funding agreements, leases/CSAs, operational transition planning.
1 Jan 2027	Legal completion 3-1 trust merger: academies transfer; new merged trust operational.
Jan 2027–Mar 2028	Integration, culture, training and merged trust school improvement planning; benefits realisation.

2. Governance and Legal Workstream

Feb–Jun 2026: Design and Approvals

1. Articles of Association and church documentation

- Finalise Equity Articles (objects, member/trustee composition, reserved matters, local governance).
- Secure conditional and then final diocesan consents for all church schools, including any Members' Agreements, MoUs and Church Supplemental Agreements.

2. Members, trustees and local governance

- Appoint agreed members and trustees of the new trust, ensuring required diocesan appointments and any foundation trustee ratios.
- Design and approve a new Scheme of Delegation (sub scheme??) for local governing bodies, protecting church school ethos and community representation.
- Stakeholder consultation plans agreed and communicated.

3. DfE and charity/company processes

- Respond to RD queries and conditions following March panel, including any requirement for updated financial plans and due diligence outputs.
- Prepare board resolutions in each trust approving the merger terms, Article changes and transfer documentation.

- Submit any required Charity Commission consents for regulated alterations to objects.

Jul–Dec 2026: Transaction Documents and Completion Readiness

1. Funding agreements and deeds

- Draft and agree Deeds of Novation and Variation for incoming academies and any master funding agreement changes.
- Prepare Deeds of Termination and Release for closing trusts.

2. Land and site arrangements

- Map land interests for all schools (leases, freeholds, CSAs, PFI sites).
- Prepare and agree assignments, transfers and new CSAs as required with diocesan trustees and local authorities.

3. Company law and registration

- Update Companies House filings for directors, registered office and Articles.
- Plan filings for closing trusts through to dissolution post-transfer.

4. Legal completion checklist

- Maintain a consolidated conditions precedent list covering DfE, dioceses, lenders, PFI counterparties and landlords, with clear ownership and deadlines.
- Confirm all conditions satisfied at least four weeks prior to 1 January 2027 where possible.

3. Educational, People and Culture Workstream

Mar–Oct 2026: Due Diligence and Design

1. Educational due diligence

- Complete school improvement, safeguarding and curriculum due diligence across all academies.
- Identify strengths, risks and support requirements; feed these into RD assurance and trust risk register.
- Agree the future school improvement strategy, including hub structures, executive leadership roles and church school distinctiveness support.

2. Organisational design

- Design the future central team (education, HR, finance, estates, IT, governance).
- Agree SLT and principal reporting lines and any new cross-trust roles (e.g. Director of Church School Effectiveness, Director of Inclusion).
- Consult with affected post-holders on proposed structural changes.

3. TUPE and workforce engagement

- Map all transferring staff, including centrally employed and diocesan-funded roles.
- Engage early with trade unions and staff to explain rationale, timeline and likely impact.
- Run formal TUPE consultation in line with legal advice and the agreed timetable.

Sep–Dec 2026: Implementation Readiness

1. Policies and safeguarding alignment

- Harmonise key safeguarding, behaviour, SEND, HR and exclusions policies ahead of day one.
- Ensure diocesan requirements for RE, worship and ethos are fully integrated for church schools.
- Identify permitted local variations, particularly for admissions and worship within statutory and diocesan frameworks.

2. Cultural integration and communications

- Co-create a shared vision and values set that brings together church and community identities.
- Develop and deliver a communications plan for staff, parents, pupils, dioceses and local authorities, including clear FAQs.
- Schedule engagement events (briefings, Q&A sessions) during each key phase.

3. Training and induction

- Plan trust-wide induction for all central staff, headteachers and local governors (Dec 2026/Jan 2027).
- Cover governance, financial regulations, safeguarding, ethos and key policies.
- Prepare onboarding materials and e-learning packages.

4. Finance, Estates, IT and Operations Workstream

Apr–Oct 2026: Due Diligence and Design

1. Financial due diligence and planning

- Produce a consolidated 3–5 year financial plan for the merged trust.
- Agree the central top-slice, service offer and financial KPIs.

2. Banking, audit and insurance

- Select future banking provider(s) and agree account structure and signatories.
- Appoint auditors and confirm audit timetable
- Manage outgoing trusts company/ financial close/ wind up.
- Align insurance arrangements and decide on a single provider and renewal cycle.

3. Estates and capital

- Develop a combined estates strategy and asset management plan for the merged estate.
- Align capital projects, maintenance plans and condition funding across schools.
- Ensure stewardship expectations for church assets are reflected.

4. IT and data

- Decide on preferred MIS, finance, HR and payroll systems.
- Plan data migration and transition, including safeguarding and SEN data.
- Establish a unified data protection framework and data-sharing agreements between legacy trusts.
- Procure/ implement (in house) payroll provider

Oct–Dec 2026: Transition Planning

1. Operational transition

- Finalise day-one processes for payroll, pensions, procurement, expenses and incident reporting.
- Test payroll and core systems in advance to avoid disruption.
- Produce a “Day One Handbook” for school leaders and business managers summarising key contacts, processes and delegations.

2. Risk management and business continuity

- Maintain a programme-level risk register with clear owners and mitigations.
- Project team & Operational leads, agree post-merger integration and collaboration plan.
- Develop contingency plans for delayed transfer (e.g. move date to 1 April 2027) and agree escalation triggers and mitigations.
- Run readiness process (payroll, ICT, Site teams etc) review in November/December 2026.

5. Post-Merger Integration (Jan 2027–Mar 2028)

First 3 Months (Jan–Mar 2027)

- Implement agreed collaboration plan, day one requires aligning financial practices, safeguarding practices, escalation routes and reporting.
- Confirm governance tone and title (board, committees, local boards) and ensure all bodies are quorate and trained.
- Monitor operational stability (payroll, IT, safeguarding, SEND, estates etc) and resolve an action plan for legacy issues identified in due diligence.
- Programme calendar spaces for “mid project review” project team meetings. (Plan/ Adjust)

Months 4–12 (Apr–Dec 2027)

- Embed cross trust professional networks (curriculum, SEND, Christian distinctiveness, business management, H&S, site teams, finance, HR, ICT etc).
- Review and refine the Scheme of Delegation (agreed sub scheme) and central service offer based on practice and feedback.
- Track progress against original merger objectives (educational outcomes, financial resilience, estate utilisation, leadership capacity).

Months 12–18 (Jan–Jun 2028)

- Conduct a formal evaluation of merger benefits and lessons learned.
- 12 mos post-merger report for Trustees/ HTs/ DfE/ DBE and following 12 mos action plans
- Use findings to inform the next phase of trust development (restructure, hub configuration, further partnerships or growth planning).

Church House Guildford
20 Alan Turing Road
Guildford
Surrey GU2 7YF

23rd April 2025

Sent by e-mail

Dear Dame Kate

Merger proposals for LPAT, ELT and LPCAT

Thank you for your letter last term which reflected our conversation when we met on the 29th January regarding the Diocesan position for the merger proposals of these Church of England and Community Trusts.

Since that meeting there have been some further developments which has changed the proposed way forward for the mergers of these Trusts which I would like to share with you.

In March, the Chairs and CEOs of Learning Partners Academy Trust (LPAT), Enlighten Learning Trust (ELT) and Learning Partners Church Academy Trust (LPCAT) all met together with me and my Deputy Director and have agreed to move forward with a joint proposal for a merger of all three MATs.

As part of these developments, both the LPCAT Trust Board and the ELT Trust Board resolved to join LPAT as a new merged entity. In addition, the LPAT Board formally resolved to adopt Church of England Articles of Association with equity clauses which would enable LPAT to accept Church of England schools in line with the nationally agreed Memorandum of Understanding.

From the perspective of the Diocese, these are welcome developments which supports our academy strategy to ensure that there is sufficient capacity for our Church schools to join a Church MAT if they seek to do so. It also ensures that these Church MATs will achieve the necessary scale to remain sustainable in the longer term.

In our conversations with the Chairs and CEOs of the Trusts, I have made it clear that the Diocesan Board of Education (DBE) will need to formally approve these merger proposals before a merger application can be sent to the Regional Director's office. We anticipate that the merger proposals will be formally reviewed by the DBE in the Autumn term (2025) with a merger application to the Regional Director submitted in the Spring term (2026).

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In the meantime, we believe that it is sensible for the individual MATs to continue to accept those Church and Community schools already in their pipelines for 2025 subject to the normal approval of the Regional Director and DBE.

We expect that these academy conversions will be completed in academic year 2025/26. The three trusts will formally merge during the year 2026/27. We would not expect any new schools, who have not already expressed an interest, to join the new merged Trust in this window to allow time for the new Trust to consolidate its position.

When we met, we briefly discussed the future of Esher Church School (ECS) as single academy trust (SAT) and our intention is that this school will join either ELT or LPCAT in the next 12 months before the formal mergers of the three Trusts take place.

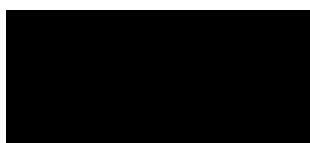
The ECS Trustees are meeting this term to make a final decision on their future direction and I anticipate that they will ask for the Regional Director's approval to join one of the Church MATs in due course.

I hope this update is helpful to you Kate, I appreciate that things on the ground have moved at pace so wanted to ensure you were updated on developments.

If you have any queries or questions on these proposals, I would be happy to discuss them with you.

I have copied in Jack Mayhew and Mike Boddington, the CEOs of the Trusts so they are aware of our communication.

Yours sincerely,



Canon (Mr) Alex Tear FCCT
Diocesan Director of Education

cc

Jack Mayhew, CEO, Learning Partners Academies Trust & Learning Partners Church Academies Trust
Mike Boddington, CEO, Enlighten Learning Trust