



TRUST DEVELOPMENT PLAN

DECEMBER 2023 TO NOVEMBER 2026

The Balcarras Trust

Plan Approved by the Board: January 2023

Review Dates: December 2024

The Balcarras Trust Development Plan December 2023 to November 2026

When we launched the Balcarras Trust in December 2020 we decided to operate on three-year development plans. The first plan launched in December took us through the first three years with a final review sign off at the September 2023 Full Meeting of the Trust Board. The plan was hugely ambitious and was in fact conducted for a large part under the severe pressure created by a global pandemic. The Trust that emerges at the end of that plan is firmly established in the educational landscape and now looks forward to next phase of its development.

As we start this next phase of our development, we are a three-school trust located in Gloucestershire. We have 1 school operating 11 to 18 and 2 schools operating 11 to 16. The Trust is minded towards sustainable growth during the course of this plan. Although we are currently a secondary based Trust we are open to the possibility of developing a cross-phase Trust in the years ahead. Indeed, we have always felt that there would be significant advantages to be had in deepening and developing the links between primary and secondary schools.

As we launch this development plan the challenges we face have not grown any weaker. Funding continues to be tight, and we operate in a shire county which means that we receive significantly less per pupil than similar schools in other authorities. SEND funding is in crisis nationally and this is placing enormous strain on schools, such as ours, that have a higher-than-average number of EHCPs. Maintaining our commitment to inclusion against this backdrop will be one of the biggest challenges in the next three years.

As we set our priorities for the next three years it is important that we are mindful of the Key Performance Indicators against which we will be judged as a Trust. We want to set aspirational targets for our schools but we also want to maintain a comprehensive and inclusive ethos. We will endeavour to make sure that everyone involved in the trust understands the added value that accrues from trust membership.

Section 1 THE KEY PERFORMANCE INDICATORS OF THE TRUST

No	Target	Details	By whom and when?	Progress
1.1	All schools oversubscribed on first preference	It is crucial that we continue to ensure that the Trust's schools are full. We want them to be popular and oversubscribed	DLB to Report to Board Headteachers to oversee marketing strategy	In 2023 our schools were oversubscribed on first and second preference across the Trust
1.2	Progress 8 +0.5 or higher across the Trust at Secondary level	Our aim is to put the Trust's schools in the top quintile for progress	DLB to Report to the Board regularly	Progress Score for 2023 was +0.5

1.3	Schools to be inclusive and fully supportive for pupils with SEND	SEND pupils to achieve progress scores above national average for all pupils	DLB to Report to the Board regularly	Trust Score for low prior attainers in 202-23 was +1.03
1.4	Disadvantaged pupils to achieve above national average for all pupils	The Trust is rightly proud of its inclusive ethos. We want to ensure that pupils with SEND and Pupil Premium pupils make excellent levels of progress.	DLB to Report to the Board regularly	In 202-23 the combined Trust figure was -0.05
1.5	Attendance in top quintile	High levels of attendance are key to success	DLB to Report to the Board and track attendance through the year	Balcarras and THSL both comfortably inside the top quintile last year
1.6	Low level of suspensions/exclusions Trust to track below national and local averages	Low levels of suspension and permanent exclusion are a sign that the school's behaviour policy is working.	DLB to report to the Board regularly	All schools below local and national averages (Nov 2023)
1.7	Every school to be at least GOOD in OFSTED inspection	It is important that every school in the Trust is at least GOOD on its most recent OFSTED inspection. Where this is not the case the Trust will insist on a Recovery Plan	DLB to report to Trust Board regularly	Balcarras (OUTSTANDING May 2014) THSL (PENDING 2023-24) Winchcombe (GOOD May 2022)
1.8	High level of satisfaction on School Parental/Pupil Surveys	The schools in the Trust engage in regular Parental/Pupil Surveys (at least annually)	To be completed at school level DLB to report to the Board	
1.9	High levels of staff satisfaction on Staff Surveys	Likewise the schools conduct an annual staff satisfaction survey	To be completed at school level DLB to report to the Board	
1.10	All externally accredited functions to continue to hit their KPIs and assessment criteria met	The Trust runs a number of important externally accredited initiatives: GLOW Maths The Balcarras Teaching School Hub Gloucestershire Initial Teacher Education Partnership (GITEP)	DLB to report to the Board regularly progress against KPIs for each	GLOW Maths KPIs met and exceeded in 202-23 Balcarras Teaching School HUB KPIs met and exceeded in 202-23 GITEP awarded OUTSTANDING in OFSTED inspection June 2023

1.11	Trust to operate a balanced budget	It is crucial that we continue to operate on a sound financial footing	TPC/DLB/Heads/ALL Ongoing	Trust in balance 2022/23
1.12	Separate KPIs to be developed if Primary Schools join the Trust	We should be mindful that our KPIs might need adapting if primary schools join the Trust	DLB/ALL In the event	

Section 2 THE TRUSTEES/MEMBERS/LOCAL GOVERNORS

We are very fortunate to have such a strong group of members/trustees/local governors. Continuing to ensure this is the case via high quality training and recruitment, where necessary, will be absolutely crucial to the future success of the Trust and its schools.

MEMBERS

No	Target	Details	By whom and when?	Progress
2.1	Create opportunities for further Member/Trustee/Senior Staff liaison	Further opportunities for Member visits into schools Perhaps creation of a Members Day somewhere close to the AGM	DLB to invite Members to key Trust events DLB to consider possibility	
2.2	Continue to consider the appointment of new members	Succession Planning in this area in conjunction with the existing 5 Members	DLB/BR/ALL to consider Perhaps through informal liaison with Members	
2.3	Members to receive DLBs CEO Reports	Reports to be sent to Members in addition to the Annual Trustees Report	DLB Ongoing	

TRUSTEES

No	Target	Details	By whom and when?	Progress
2.4	Continue to review the make up of the Trust Board with a particular focus on ensuring that the Board is suitably diverse and that it represents the community that it serves.	Two new Trustees are joining the Board in November 2023 as this new plan launches. This takes us to a Board of 9 Trustees	BR/JM/ALL Continuous	

2.5	Continue to review the size of the Trust Board linked to review of the Scheme of Delegation	Our Current Scheme of Delegation allows for 9 Trustees plus the possibility of co-opting a further 3. We will keep this under review	BR/ALL Ongoing	
2.6	Continue to succession plan	It is important the Trust Board continues to consider the crucial issue of succession	ALL Ongoing	
2.7	Continue to Carry out an Annual Skills Audit linked to the above	The Trust already has a regular programme of audit in this area	GS Autumn every year	
2.8	Continue to Develop a Strategic Programme of Trustee Training	<p>It is very important that we continue to provide high quality training.</p> <p>Exclusions Training Autumn 2023</p> <p>Curriculum Training Autumn 2023</p> <p>EDI Training Spring 2024</p> <p>Mental Health/Wellbeing Summer 2024</p> <p>Two Year Strategic Safeguarding Training Autumn 2024</p> <p>Other issues to be identified for Spring 2024 Summer 2024 Autumn 2024 Spring 2025 Summer 2025</p> <p>Possible issues to include: Disadvantage/Pupil Premium SEND/Inclusion Attendance Staff Wellbeing</p>	<p>GS/DLB/ALL</p> <p>Organised by HLW</p> <p>Organised by GS/DLB/HLW</p> <p>Organised by DLB</p> <p>TBC</p> <p>TBC</p> <p>TBC</p>	

		Primary Education Special Education Education Funding		
2.9	Continue to seek our best practice from other Trusts	In addition to training we will continue to seek out the best practice and ideas as we did in the previous plan. A regular programme of visits and seminars with external trusts and leaders should be encouraged. Visits to include gathering information on improving schools with significant weaknesses	DLB/BR/GS/ALL Ongoing	
2.10	Trustees to receive standardised Headteacher Reports	We have moved towards standardised headteacher reports. These should be extended to Winchcombe and new schools joining the Trust	DLB June 2024	

LOCAL GOVERNORS

No	Target	Details	By Whom and When?	Progress
2.10	Continue to develop a Programme of training for local governors	It is important to continue to offer regular training for local governors in addition to their annual safeguarding training	BR/DLB/HLW/JT to consider	
2.11	Continue to develop opportunities for liaison between governors and trustees	In addition to training we will look to offer regular development sessions for Local Governors and Trustees on issues such as: The Curriculum Pupil Premium Strategy SEND Best Practice Behaviour	BR/DLB/HLW/JT to consider	

2.12	Move Towards Standardising LGB size at 16	Each of our LGB have a maximum capacity of 16. However as we launch this plan we have vacancies on each of the Boards. We should look to bring them all up to capacity	BR/DLB Jan 2025	
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Section 3: SCHOOL IMPROVEMENT

No	Target	Details	By Whom and When?	Progress
3.1	Develop System of Data Tracking across the Trust	To include: GCSE Comparison by subject In Year data tracking of progress by subject Attendance Suspensions/exclusions Safeguarding data	JT To lead on this Suggested scheme by July 2024	
3.2	Develop School to School Support Networks	To Include: Subject Networks Senior Leader Network Pastoral Network SENDCo network	HLW to lead on this Work already underway in conjunction with DLB and JT	
3.3	Specific Brokered School to School Support	The Trust is in a position to offer very specific support into schools when and as it is necessary. This support is across the full range of subjects and support at middle management level	DLB to lead on this in conjunction with heads and SAL	

Section 4: COMPLIANCE and FINANCE

No	Target	Details	By whom and when	Progress
4.1	Continual development and renewal of the Trust's policy platform	It is crucial that the Policy Platform is constantly reviewed and updated. We should create a scheme which identifies Policies held at Trust level and nominates an executive and trustees member to have oversight	KR, DLB, Heads, ALL Overarching Policy schedule to be in place by Easter 2024	
4.2	Safeguarding and Child Protection	We already have a protocol for overseeing this across the Trust. The Trust will consider developing a Strategic Plan to develop Safeguarding and Child Protection	DLB/MH Strategic Safeguarding Development Plan by Summer 2024	
4.3	Trust to audit annually premises management in each of the Trust's schools	We will arrange an Annual Audit of Health and Safety and Premises Management in each of the Trust's schools	TPC/DLB June 2024	
4.4	Implementation of the Trust's new Financial Procedures Manual	We have just rewritten the Trust's Financial Procedures Policy. It will need constant review	TPC Ongoing	
4.5	Continue to operate balanced budgets in each school and across the Trust	It is crucial that we continue to operate a balanced budget. New software being installed 2024	DLB/TPC Ongoing	
4.6	External Review of Governance	The Trust had an external review of Governance in November 2022. It would be good practice to carry this out once every two years	DLB/BR Summer 2024 Summer 2026	
4.7	Regular Consideration of Risk	The Risk Register is now considered at every FAR meeting. It is crucial that this continues to be the case and that this oversight is reported to the Full Board. In addition to this we will develop an Annual Meeting to review each of the Risk Registers we hold	PH/TPC/KR Ongoing First Annual Risk Summit Summer 2024	
4.8	Development of a Business Plan	The Trust will create a Business Plan	TPC/DLB/BR/PH Summer 2025	

4.9	Identify areas where the Trust can make efficiency savings	As the Trust grows we will focus on making efficiencies	TPC/DLB Ongoing	
4.10	Continue to campaign for adequate funding for schools	The Trust has always been active in campaign for an improved funding model. We will continue to lobby as hard as we can particularly as regards the postcode discrepancies that still exist in the system, the dire state of funding for special needs, and the unfair funding decisions which mean that post 16 pupils receive considerably less than 11-16 pupils even provision for them is more expensive	DLB/TPC/ALL DLB has 4 year term as Academy Representative on Schools Forum Sept 2023 to Sept 2027	

Section 5: CENTRAL SERVICES

No	Target	Details	By Whom	Progress
5.1	Scale up Trust Finance Office	The Trust will grow from being £15 million business to being over £20 million by 2024 even without further expansion of the Trust	TPC Ongoing	
5.2	Continue to develop HR Provision across the Trust	In amalgamating Winchcombe we should consider whether there is capacity to increase our HR section	TPC/DLB Review by summer 2024	
5.3	Catering	We run a very successful Catering service. We will consider extending it across all three schools	DLB/MH/IC IC to visit Winchcombe and assess whether it could be amalgamated into the Trust Catering Business Spring 2024	
5.4	IT	We currently operate first class IT systems in each of our schools. JA has responsibility at Trust level to ensure that this continues to be the case	JA/DLB Ongoing	

5.5	Continue to review 3% Top Slice	We are operating in the bottom 5% of Trusts for top slice income. We will continue to review this	ALL Regular review	
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Section 6: GROWTH OF THE TRUST

No	Target	Details	By whom	Progress
6.1	Trust to consider implications of further growth	Growth possible into primary sector. Other secondary schools also possible. Significant interest exists from the primary sector	ALL/Trust Development Committee	
6.2	Harmonisation of IT systems as the Trust grows	We should consider harmonising our systems as far as possible	JA/DLB Ongoing	
6.3	Executive Model	Continuous review of the executive model of the Trust as it expands will be crucial. It is also important to consider succession planning in the executive team	ALL/DLB Ongoing	
6.4	Capital Strategy	We have adopted a Capital Strategy for the Trust. We should be mindful of the requirements of SCA before we move away from CIF. We will put together a CIF Strategy for the Trust	DLB/TPC/ALL CIF Strategy Summer 2024	
6.5	Develop Sixth Form Capacity for the Trust	The Trust currently runs a sixth form with 361 places. We will need greater capacity in the future but also have to make plans for what we do if we cannot deliver extra capacity	DLB/ALL/HLW/JT/DL ASAP	
6.6	Development of an Operational Plan	Beyond the Operations set out in the Financial Procedures Policy and the Decision Making Matrix we have committed to creating an overarching operational plan which sets out where responsibility lies in the Trust	DLB/TPC/ALL Spring 2024	
6.7	Draw up an Estates Management Plan	Now that we have three schools in the Trust we will develop an Estates Management Plan	TPC Autumn 2024	

Section 7: SYSTEM LEADERSHIP/OUTREACH

No	Target	Details	By Whom	Progress
7.1	The Trust will need to reapply for Teaching School Hub Status	This work began shortly before this plan was published under EJC's leadership. It is crucial that we are successful. Well over £0.5 million depends on it	Bid submitted by EJC /DLB Trust to find out in the Spring	Bid submitted November 2023
7.2	Teaching School Hub to continue to hit its KPIs	KPIs for TS Hub are ambitious. So far we have met them	EJC/DLB to monitor DLB to Report to the Board Ongoing Minutes available for Trustees	
7.3	GLOW Maths Hub to continue to be nationally recognised and to hit its KPIs	Annual Reaccreditation as a Maths Hub was secured in Oct 2023. Crucial that this is secured year on year. About £0.9 million per annum dependent on this	DLB, SAL, EN and GLOW Maths Strategic Board Ongoing Minutes available for Trustees	
7.4	The Gloucestershire Initial Teacher Education Partnership to continue to flourish	GITEP has 58 trainees for 2023-24 but the break-even point is 80. DLB will continue to Chair the Board and work closely with colleagues from GASH Limited to support the development of GITEP	DLB, RR, GITEP Management Board, GASH Ltd Ongoing Minutes available for Trustees	
7.5	Trust to continue to play as broad a role as possible as a system leader in the southwest and nationally	The Trust believes in system generosity and will always seek opportunities to cooperate and collaborate with other schools and Trusts. DLB continues to play an active role in southwest system leadership and HLW and JT are also active in many networks	DLB to report regularly to the Board Ongoing	
7.6	Continue to invest in the Cheltenham Education Partnership	The Trust's schools are all members of CEP	HLW is on Leadership Board for CEP	

			Ongoing	
7.7	Trustees and colleagues across the Trust should be regularly appraised of how this work benefits the Trust, its schools and its children	The Trust's role in system leadership is not purely altruistic. It directly benefits the Trust and its schools. DLB will be mindful of the need to report on this to the Board and to colleagues across the Trust	DLB Regular reports through CEO Reports	