



**Equals Trust**  
**Strategic Plan**  
**2016 - 2020**

**Adopted : May 2017**

**Review : Annually**

**Signed:**

A handwritten signature in brown ink that reads "Peter Soale".

**(Chair of Trust Board)**



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Approved



## Foreword from the Chair of Equals Trust

Welcome to this document, the first Strategic Plan to be produced by Equals Trust. The Trust was established in September 2016 and we have spent our first year working together to build good relationships and develop our understandings of what the Trust should and can achieve. We have also been looking at how best to organise ourselves at a strategic and operational level to ensure that we deliver the best possible outcomes for all the children who attend one of our schools. This plan encapsulates the outcomes of that work and sets out the principles and procedures that will determine how the Trust operates and manages future growth.

All of us who work in or for the Trust – Members, Directors, Head Teachers and all our staff – share a common goal: to do the very best that we can for all the children in all our schools. Their needs are at the centre of all our thinking and every decision that we make is taken with them in mind.

Each of our schools serves a unique community and has its own particular character and challenges. These schools are led by an exceptional and highly respected group of school leaders who believe in the benefits of collaborative working and sharing professional expertise to develop classroom practice that will allow every child to achieve their full potential, taking account of the local context. I am privileged to lead a knowledgeable and talented Board of Directors that shares these values and is committed to doing all it can to support and develop our leaders and our schools.

We are a young Trust and have much to learn about how best to deliver our strategic objectives. Despite that, I know that we have access to the knowledge, skills and experience that will be needed as we grow and develop to ensure that our schools and the children in them will thrive.

**Peter Foale**  
**Chair**  
**Equals Trust**



## Executive Summary

This document outlines the strategic direction of Equals Trust ('the Trust') and has been developed in consultation between the Board of Directors and Leadership Group.

It takes in to account how and why we would consider the introduction of further schools into Trust and the processes and procedures that this would involve.

The Trust has identified key areas for strategic development:

- Financial strategy and controls
- The growth of Equals Trust
- Communications
- Governance
- Workforce strategy

In conjunction with the strategic aims of Equals Trust, the Board of Directors and Leadership Group recognise the pivotal role that each member academy will play in its delivery and as such there are specific aims targeted at each member academy:

- Vision and values
- Achievement
- Quality assurance and data

## An Introduction to Equals Trust

Equals Trust is a primary phase multi-academy trust based on the principal of equality, founded with the aim of allowing member schools to maintain their ethos and unique identities within a tight local network, with strong mutual accountability, shared support services and a strong collaborative approach to staff development and school improvement.

We work collaboratively together with a clear purpose and direction, where:

- teaching and learning are at the centre of all we do;
- children enjoy, and are engaged in, a curriculum that challenges and excites them;
- we develop responsible citizens who value diversity;
- we ensure a culture of high expectations amongst all our children;
- children value themselves and each other, developing the self-confidence and resilience to face future challenges;
- the contributions made by all stakeholders are valued.

We work effectively in school partnerships to enhance our provision by:

- extending the learning opportunities and activities for pupils;
- enriching the curriculum through partnership working and shared resources;
- enabling the greater sharing of excellent teaching and learning;
- enhancing the professional development of teaching and support staff;
- building mutual support and accountability for Head Teachers and Governors;
- securing cost and resource efficiencies through joint commissioning.

The strategic aims for the next three years are detailed below and highlight the ways in which the Trust will deliver its vision while adapting to wider changes in the education sector.

# Strategic Aims for Equals Trust

## *Financial Strategy and Controls*

- To identify and develop new and existing expertise and resources across the Trust to ensure their efficient and effective use for all member schools.
- To encourage and develop optimum school to school support.
- To embed and review a clear funding strategy for the Trust and its member schools.
- Develop key functions to provide central services to member schools, such as estate management, finance and school improvement.
- Develop and implement clear schemes of delegation and levels of accountability
- Audit, evaluate and develop a shared data management system to ensure consistency of reporting across the Trust
- Implement and monitor the contribution for Trust services from each member school on an annual basis
- Work closely with the Local Authority, academy trusts and other local schools to understand the range of solutions that can be achieved for problems and issues faced across the entire education sector.

## *Strategy for Growth*

- Develop a clear strategy for growth to include the rate of growth, optimum number of academies at each stage and the balance of primary/secondary and sponsored/converter/free school.
- Review governance, leadership and business structure of Equals Trust when new schools join the Trust.
- Identify key services required by Academies joining Equals Trust and develop clear specifications for commissioning such services.
- Develop central services in line with a clear financial strategy according to the identified need of the members of Equals Trust.
- Develop an estates plan and programme for capital expenditure in line with the growth strategy and needs of the Trust.
- Identify the information technology needs within each member academy and develop an IT infrastructure in line with these needs and the growth strategy.
- Identify and develop strategies for growth in additional provisions, such as nursery, holiday and breakfast clubs.

## *Communications*

- Develop a clear public relations strategy that encompasses national, regional and local media.
- Develop a media crisis strategy and ensure all key staff are aware of protocols in the event of press enquiries.
- Identify and develop a range of marketing platforms, such as websites and social media.
- Development consistent procedures for gathering feedback and enquiries, both internally and externally.
- Ensure all internal communications are appropriate, co-ordinated and accessible.

# Strategic Aims for Equals Trust and Member Schools

## ***Vision and Values***

- In order to embed and promote a culture of collaborative working and continuing school improvement, each member school must accept that the vision and values of Equals Trust.
- Empower Head Teachers to focus on the core values of teaching and learning through efficient and effective use of resources and the implementation of strong support functions.

## ***Achievements, Personal Development and Welfare***

- High standards of achievement are expected at all schools. All schools will be high performing.
- All schools will listen to the views of staff, students, parents to encourage our vision of collaborative teaching and learning.
- Equals Trust endeavour to promote an enjoyable working environment in which staff development is identified and nurtured.

## ***Quality assurance and data***

- All aspects of teaching and learning are quality assured both through internal and external mechanisms.
- Quality assurance is consistently applied and monitored across all member schools.
- Effective and achievable school improvement strategies, monitored by the Board of Directors and Local Governing Bodies, in each member school.

## ***Governance***

- Local Governing Bodies are accountable to the Board of Directors and there are checks and guidance to support this process.
- Local Governing Bodies feel empowered to perform their roles for the benefit of each individual school and the Trust.

## ***Workforce Strategy***

- Equals Trust employ all staff to a designated school with opportunities to work across the Trust if requested.
- Equals Trust will encourage appropriate levels of continuing professional development across all staff where possible.
- Common employment practices implemented across the Trust, recognising the fact that new schools joining the Trust may come with varying Human Resource issues.