

## PURPOSE AND TIMING OF CONSULTATION

The purpose in general of a consultation in regards to change of academy/school status is to **listen to the views of interested parties and ensure their questions are answered and considered in the decision process**. In regard to this consultation the board decided to consult early in the process, so at the time we had decided to go ahead with doing due diligence, but before it was actually done, and before any official applications or contracts have been signed. This has meant that some of the questions asked are still being looked into and answers are currently not complete, but it has provided the board with a wide variety of questions, which is useful and the purpose of the consultation. This document is answering as much as we can currently, and will form part of the consideration of the board in respect of whether to apply to the Regional School Commissioner (RSC) for permission to join West Lakes Multi Academy (WLMAT).

## BACKGROUND QUESTIONS

### SHOULD QEGS JOIN/FORM A MAT OR STAY AS A SINGLE ACADEMY TRUST?

It is now official government policy that all schools will be part of a MAT. The deadline is 2030, but this could potentially be brought forward, as originally date was 2025. It has been debated by the Grammar School Heads Association (GSHA) whether to wait for a potential change in political party in power, and they have discussed it with their political contact. As it stands, both major parties are in support of all schools joining a MAT by 2030, so no change of direction is expected in case there is a change of government

In addition, our ongoing discussion / dispute with ESFA over the last two years has highlighted the vulnerability of a Single Academy Trust, especially financial risk, including the cost of expert advice, and also the onerous governance role.

We also discussed what our non-negotiables were in joining any MAT. They were that we would be guaranteed to keep our selective status, that there should be no changes to staff employment terms and conditions, and that we would keep control of our estate. Less tangible, but just as important, is that we keep QEGS's ethos and identity.

### WHEN WOULD BE THE BEST TIME FOR QEGS TO JOIN A MAT?

The question of timing the joining of a MAT is one we have considered at length, and the issues were raised by others in the consultation. It is answered in different part of other answers.

### WHY NOW, WE CAN WAIT UNTIL 2030?

Although there is a deadline of schools to be in a MAT by 2030, in reality once a policy is in place it is usual practice for incentives and disincentives to drive the direction of travel of a policy over time rather than an abrupt change when the deadline is reached. This will happen over the immediate next few years, long before 2030.

Currently SAT's can apply for Condition Improvement Funds (CIFs), but according to an article in TES June 2022, based on data from DfE, only a third of applicants are successful. Bids are marked on need, but also on how much the school can contribute, so somewhat ironically the schools struggling

most financially are therefore further disadvantaged. In contrast to this, MATs with five schools and 3000 children currently get automatic maintenance funding. It is one of the areas where there is a real possibility that SATs will become more disadvantaged over the next few years, and before 2030. Finance is crucial for all aspects of school life, the quality of education, the resources and opportunities we offer our students, the ability to attract and keep the best staff, and much more.

The board thinks that the Government policy will leave QEGS in a very isolated situation, with reduced control of our own destiny and influence over our non-negotiables, as time goes by. A Single Academy Trust demands a lot of the governing board, the current situation has shown that this is not viable in the long run.

QEGS is not alone in looking into MATs, the Regional School Commissioner is seeing significantly increased activity in this area, and Grammar Schools in general, who have been reluctant to look into MATs, are also exploring options.

#### WHY NOT WAIT UNTIL NEW LEADERSHIP IS ESTABLISHED AND SETTLED?

A consideration for the Board when advertising for a new Head, is that now that government policy is for schools to be in a MAT, a Single Academy Trust may increasingly become unattractive due to possible disinvestment and the knowledge of future unpredictable change. The new Head Teacher is currently working in a MAT, and was fully aware of the possibility that QEGS might join WLMAT at the time of recruitment.

It is for trustees to set out the vision and direction for the school. This is particularly true when we will have a new leadership team. The Board did not think it would be fair to the team, particularly the new head teacher, not to be open and honest about our thinking from the outset. The new Head could potentially start with that decision made and be part of the practical transfer process.

#### IS THIS A DONE DEAL?

The short answer to this is no, there has been no final decision to join a MAT, and more specifically West Lakes MAT. We are still in the process of due diligence and once that is completed, whether we proceed further will be decided upon by the trustees. See also opening statement of this document.

## WHICH WOULD BE THE BEST MAT FOR QEGS TO JOIN?

Having considered MATs in general, and deciding in our circumstances we would be better to do this sooner rather than later, the next question was which MAT would be the very best one for us to join? There were many suggestions and questions about this in the consultation.

## WHY DON'T WE START OUR OWN MAT?

There are several reasons why QEGS does not start our own MAT, below are the two main ones.

Practically we have a new leadership with no spare capacity to take on the role of starting a MAT, as well as a governing board that is also working to full capacity.

We are not in a position to start a MAT because of the dispute with ESFA. The Regional School Commissioner will not give us permission, we have asked directly. As it stands our economy is also unclear both in regard to amount of money we might need to pay back and the repayment conditions.

It is worth noting, that if we started a MAT, once the MAT is established, QEGS itself will be one of several/many schools and will have no more influence than other schools. The advantage of starting a MAT is in setting up the overarching ethos and conditions, and as long as we can find a MAT where we are happy that our conditions are met, it will in the long term be the same.

## WHY DON'T WE JOIN WITH OTHER GRAMMAR SCHOOLS / LANCASTER GRAMMAR SCHOOLS?

The DoE's strategy is aiming at MAT's with at least 7.500 students or at least 10 schools. Currently there is no MAT we can join that meets this and, as stated above, we cannot start our own. Presuming that Lancaster grammar School's started a MAT that we could join, it would still be a too small MAT, and other schools would be assumed to join, most likely other Grammar Schools. They will all be further and further away from QEGS, and we would end up geographically "on a limb" (no Grammar Schools are further North than we are).

Though QEGS is a Grammar School our intake of children is unusual in that we have a reasonable segment of "middle attainer" children (as they are called in the statistics). Neither of the Grammar Schools in Lancaster have any, they only have "high attainer", and that is the picture across the country. That does in itself not say that there will not be academic benefits, but the fit is not as obvious as it immediately looks.

Finally, QEGS has an important role in the local community, and that role should be celebrated and expanded, which will be more difficult in a Grammar School MAT with its centre well away from Penrith and joining schools being Grammar school. It is for example very unlikely that there will be a possibility further along the way for local primary schools to join such a MAT.

## WHY NOT JOIN....

The board went through a thorough exercise of all MAT's that had schools in the wider area around Penrith, which included some nationwide Trusts. This was combined with local knowledge on the

Board and suggestions from the Regional School Commissioner, and West Lakes MAT was deemed the best opportunity. During the consultation there were specific questions raised particularly in regards to Keswick School, Ullswater Community College and Cumbria Education Trusts. For various reasons, the board found them structurally incompatible.

## WHY JOIN WEST LAKES MAT?

There were many questions in regards to the choice of West Lakes MAT as the one the Board chose to start the due diligence process on, mainly regarding West Lakes Academy's academic status and progress.

West Lakes Academy has, for 2017 – 2019 (the most recent years with exams data) better GCSE Progress 8 results than we have. For A level they have had progress above average all three years, again better than QEGS (with the exception of 2019 when we were comparable with them), and in 2019 both QEGS and WL Academy had an overall attainment of B- for A level but WL Academy had a higher % of students achieving AAB or higher in two or more subjects. The only area where QEGS has better results is in attainment for GCSE – which is fully to be expected considering we are a selective Grammar School.

West Lakes Academy has been awarded Outstanding by Ofsted in 2018 (QEGS's Outstanding report is from 2009), and the 4 primary schools are either Good or Outstanding.

West Lakes Multi Academy has been designated as the Teaching School Hub and has established One Cumbria, which provides Continuous Professional Development for teachers all around the county. They have also been asked to lead the Secondary School Computing Hub. They were the only school in the North to be asked by the Department for Education to help them write the Teacher Workload Toolkit. When the toolkit was reviewed, the DfE asked West Lakes Academy to lead on it for the North of the entire country. It has also been designated as the only Initial Teacher Training provider in the county for 2024 onwards following the ITT Market Review and this is based on the quality of their CPD programmes.

All the above shows that we have plenty in common with West Lakes MAT academically, but it is also true that there are areas where we are different and the catchment areas of the two schools have different socio-economic patterns. Both the Board of QEGS and West Lakes MAT see this as something positive, where we each can learn something new, as well as work together in areas where we are alike.

Being a Grammar School is integral to the ethos of QEGS, so while we want to learn from the differences with WLMAT, we have also had the offer to join with a School Improvement Partner which is a Grammar School. This will give us the possibility of closer collaboration with another Grammar School than we currently have, and it would provide the new Headteacher with support from an existing, experienced and outstanding Grammar School Headteacher from a different part of the country.

There are other reasons to why the board has decided to go to due diligence with WLMAT, they are all discussed in the last section with more specific questions.

Geographically it is close enough to meet personally to create connections, but a daily physical cooperation is not practical as mentioned in several comments. There are growth plans (irrespective of whether we join), see further down, which would mean that it is realistic to expect that we will be able to also work with schools closer to us.

## SPECIFIC QUESTIONS RE. WEST LAKES MULTI ACADEMY TRUST

Some of the following questions are relevant for any MAT QEGS might join, and some of the answers will most likely be the same for other MATs, but as the consultation is in relation to WLMAT specifically, the questions are answered in respect to WLMAT.

### SELECTIVE STATUS AND ETHOS

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#### HOW WILL THERE BE A LONG-TERM GUARANTEE OF OUR SELECTIVE STATUS?

It will be included in the funding agreement, as well as the general DoE statement that selective status can only be removed by a parent vote of the school in question (so not all schools in the MAT).

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#### WILL WE LOSE OUR ETHOS? NOW AND OVER TIME?

An important part of our ethos and identity is being a Grammar School, and as stated above that will be guaranteed forever – as much as anything is forever.

Furthermore, the overall ethos of WL and QEGS are quite similar, and one important point of WLMAT's philosophy is that they want different schools to be able to provide for all the needs different children have.

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#### IS THERE A POTENTIAL ADVERSE EFFECT ON SOCIAL MOBILITY?

On the contrary. WLMAT's vision specifically mentions social mobility (ours doesn't), and their setup is very clearly aimed at that. By staying local(-ish) we also ensure that we still have a wider role to play in Cumbria helping social mobility.

### BENEFIT AND RISK TO STUDENTS

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#### WILL THE CURRICULUM STAY THE SAME?

The short answer is YES, both in respect to subjects and exam boards. We have specifically looked into subjects with small numbers, which are not technically economically viable, but which adds diversity and opportunity for all students. WLMAT supports this approach, and that is borne out by West Lake Academy running subjects with small number of students, just like we do.

This is an important part of the due diligence process, and a much more detailed answer is being prepared and presented to the board.

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#### WILL STANDARDS FALL?

WLMAT states that "Together we all work to ensure that all children, irrespective of their starting points, receive an education that *is excelled by no other institution in the land*". This is a very ambitious statement, and is borne out by a practical approach to monitoring subjects, and not being satisfied with "just" an average result. This will help QEGS to not only maintain standards, but to improve further.

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## WILL THE FOCUS OF THE BOARD MOVE AWAY FROM THE CHILDREN OF QEGS TOWARDS THE CHILDREN WLMAT AND CUMBRIA?

The first priority of the Board is, and will continue to be, the children of QEGS. However, we have an obligation to interact with our community and ensure that all children have an equal opportunity to receive an academic grammar school education. We are already doing Outreach programmes, and they will continue and hopefully be extended.

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## QUESTIONS IN RELATION TO STAFF

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### WILL THERE BE A REDUCTION OF STAFF / BECOME HARDER TO ATTRACT STAFF?

The move for staff will be a technical transfer to WLMAT with no changes in terms and conditions and no redundancies. Staff will still be employed to teach at a specific school (so our current staff at QEGS), and terms and condition of employment won't change. Attracting staff will, if anything, be easier, as we can offer further Continuous Personal Development (CPD) as part of the drive from WLMAT to offer the best possible CPD for all staff. If wanted, there will be further career paths, especially as more schools join, but staff will not be moved between schools unless they themselves have asked for it.

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### WILL WE STILL BE DOING OUR OWN RECRUITMENT?

All recruitment will be decided by the individual school, apart from the Head Teacher, where the CEO and Trust Board will have the deciding role. The Local Governing Board, students and staff will all be involved in the HT recruitment.

The appointment of the new Head at QEGS recently was entirely the decision of QEGS Board.

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### WILL TEACHERS BE TIMETABLED AT WEST LAKES ACADEMY?

No, as described earlier, current teachers employed to teach at QEGS will continue to teach at QEGS.

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## PRACTICAL QUESTIONS

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### WILL SCHOOL UNIFORMS CHANGE?

No, the basic idea is to celebrate each school's individuality and keep their ethos – and the uniform is a very visible part of that.

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### WILL CATERING STILL BE IN-HOUSE

Yes – there are no plans to change this.

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### CAN QEGS STILL DECIDE WHICH TRIPS TO ORGANISE, ABROAD AND AT HOME?

Yes.

## WHAT LEVEL OF AUTONOMY WILL QEGS BOARD HAVE? WILL IT BE SUFFICIENT TO GUARANTEE THE BASE LINE REQUIREMENT QEGS HAS TO JOIN WLMAT?

The Scheme of Delegation and Terms of Reference are part of our due diligence process, as well as the composition of the Trust Board and the Local Governing Board.

Three of our requirements, no change for staff re. employment, selective status, and keeping our land and estate, is either part of the transfer and guaranteed in that process or written into the funding agreement, see also earlier, so not connected to governance.

In regards to maintaining our ethos, culture and curriculum there is a clear delegated responsibility to the Local Governing Board for policies that are important to the above areas, i.e. the Admission Policy is delegated to the LGB, and there is evidence in minutes from schools already operating in the MAT of the ability to control these areas themselves.

WLMAT has just implemented a new governance structure, that will provide closer working together of each of the LGB's and the Trust Board via Strategic Recommendation Groups (details can be found on WLMAT website). The emphasis of LGB's is part of the governments White Paper for MAT's, and the coming structure will ensure a very real cooperation between Trust Board and LGB, and also between LGBs. This is a positive step for LGBs in the MAT, and will enable governors to learn from other link governors in their area (for example Safeguarding governors) and improve the ability to hold the school to account. It is worth nothing that the structure is not guaranteed in the future, as the trust board has the right to change governance arrangements.

QEGS has been offered a place on the Trust Board, which is not part of the general structure, and would be a benefit of us joining early.

## WHAT DO THE SPONSORS (SELLAFIELD, NDA, UCLAN) OF WLMAT DO AND HOW WOULD IT AFFECT QEGS?

They provide governance for the Trust Board of the MAT, together with non-sponsor governors. Our local governing board would not be populated with members from sponsors. They occasionally provide services to the schools, such as helping to set up a trip to Japan for science students, which QEGS would be equally eligible for as the other schools. Their role is less now than at the beginning of the MAT.

## WHAT ARE THE ECONOMIC CONSEQUENCES OF THE 6% TOP SLICE OF THE BUDGET?

This is not as straight forward a question as it sounds. The consideration is made up of several parts;

- Better/shared contracts and the savings that gives everyone in the MAT.
- Which budget QEGS staff are paid from? For example, IT support is mainly seen as a central service. This means we will keep our staff in QEGS, but they will be paid from the 6%.
- Payment of unexpected costs, typically expert professional help.
- The value of better services / new services. Two examples of better services are more dedicated HR knowledge and governance support. An example of a new service is communication support, and there are plans for future support from an educational psychologist and/or a GP.

This is part of the due diligence process, and will be discussed in detail by the Board.

#### WHAT IS THE GROWTH PLAN FOR WLMAT? WILL MORE SCHOOLS JOIN IN OUR AREA?

The government's White Paper states the aim for MATs is to have min. 7,500 children or at least 10 schools. Speaking with the RSC for our area they acknowledge that it might not be so easy for an area like Cumbria ('Westmorland and Furness' and Cumberland going forward) to achieve for all MATs, but it is clear that a MAT like WLMAT is expected to grow, and to grow further than including QEGS (if we join). The vision of WLMAT is to have a controlled growth and include schools that can cater for the needs of a wide and diverse range of children. Both secondary and primary schools are part of this vision, and an interesting statistic in relation to the White Paper is that 32/33 primary schools in Cumbria per year need to join a MAT, if the government's target is to be reached.

WLMAT construct does not rely on everything coming from the west but rather a twin centre approach that sees two pillars that take a lead, one in the east and one in the west. QEGS would fulfil this role in the east, just like West Lakes Academy does in the west.

This is one of the reasons why joining now is beneficial specifically in relation to WLMAT.

## QUESTIONS RELATED TO QEGS'S FINANCIAL SITUATION, NOT PART OF CONSULTATION

After the consultation was closed, our accounts were posted and they have a potential £1.5M deficit, as earlier communicated and which can be seen in the accounts themselves. This has raised questions in regards to the consultation, so though this was not part of the consultation the main questions will be covered here.

The process with Education and Skills Funding Agency (ESFA) is still ongoing, which limits what we can say as no decision has been reached yet, neither re. amount nor responsibility. This means no specifics will be discussed, but in regards to the below questions it does not make a difference.

### WHY WERE THE ACCOUNTS RELEASED AFTER END OF CONSULTATION?

The timing of the release of the accounts were governed by ESFA and Company House deadline, and the board has not been in control of the dates.

The ESFA let us know that they estimated we owed them £1.5M early December 2022 just before we were about to sign our accounts. We asked for potential repayment conditions for our accounts, but we couldn't get any without accepting the £1.5M debt. As the board disagree with the findings, we could not accept such a liability, which is detrimental to QEGS. This left us in a position where we were unable to sign the accounts without no longer being a Going Concern.

This was the position until mid-May, where the ESFA finally agreed to soften their statement (but not the potential debt), and we were able to file the accounts to Company House in time for 31 May.

### WHAT IMPACT HAS THE POTENTIAL DEFICIT ON THE WLMAT DECISION?

In the information shared to parents and staff we said "The decision to look into joining a MAT in general was started due to the move in the educational landscape with the upcoming governmental White Paper and **as a prudent and diligent financial consideration**. With regards to QEGS's potential collaboration with specifically West Lakes Multi-Academy Trust (as it is currently named) the choice of partner was purely driven by the positive possibilities in the partnership. West Lakes is supportive of QEGS as it seeks to reach agreement with ESFA over potential repayments."

An important part of the Board's work is to consider the direction for QEGS, and with the knowledge of the potential liability as a result of the ESFA investigation as well as the up-coming White Paper, it was relevant to look into whether joining a MAT was a positive way forward for QEGS or not.

Once the decision was taken to investigate the possibility of joining a MAT, it has been done independently of the ESFA dispute in regards to which MAT to join and the due diligence process. This is aimed at giving us a full picture of the advantages and disadvantages of joining a MAT, and more specifically WLMAT, and this process is not yet finished.

When we have finished the due diligence, have considered the concerns from the consultation, and know the financial outcome of the ESFA dispute, the Board is in a position to decide whether joining WLMAT is the best way forward.