



1<sup>st</sup> March 2023

Founded in 1564 by Royal Charter, our school has been helping young people to secure outstanding academic results and providing a well-rounded experience for over 450 years. The school encourages students to take responsibility for their learning from the moment they join, ensuring they are well prepared for the challenges they face on their journey at QEGS.

The foundation of our approach is our approach to **Aiming High, Thinking Beyond** and **Striving Together** – the combination of which are the vision for our school today.

Trustees' priority is to enable our school to continue to provide an excellent education for our pupils, whilst protecting our school's ethos and identity, and retaining its individual qualities and strengths. Working together with other similar schools in a Multi Academy Trust (MAT) offers many benefits for our students, the school and the wider community as a whole.

As already announced, our school was issued a Notice to Improve in October 2022. This followed an Education and Skills Funding Agency (ESFA) investigation into the use of historic Condition Improvement Funding which now needs to be repaid. The need to join a Multi Academy Trust is clearly stated as a condition for the Notice to Improve to be lifted.

Since the Notice to Improve was issued a new Trust Board has been established to cement the governance of the school and provide a strong basis to undertake a Multi Academy Trust search and selection exercise for the school to join.

Although, the Notice to Improve names Changing Lives Learning Trust (formerly West Lakes MAT) as an intended partner, the Trust board have continued to keep the DFE and ESFA updated as they undertook this process.

In doing so the Trust Board established the following priorities in searching for a MAT:

- Retains QEGS' identity (including branding, uniform etc.)
- Compatible vision with QEGS' Vision
- The selective nature of the school to remain
- Staff rights are protected, including:
  - Abides by School Teachers Pay and Conditions (STPCD) and NJC for support staff
  - Committed to remaining in Teachers Pension Scheme (TPS) and Local Government Pension Scheme (LGPS).
- Existing staff continue to work full time at QEGS
- Provides financial security to QEGS in the long term
- High level of QEGS autonomy
  - Governance
  - Curriculum
  - Ethos
  - Behaviour
  - Admissions
  - Budget Setting
- Low risk of being taken over by another Trust
- A local presence and clear understanding of the school, local and county context
- Encourages collaboration between schools – not central control.

Having undertaken a thorough Selection Process, much consideration and understanding of what each potential MAT could mean for QEGS, the Trust Board has selected **Changing Lives Learning Trust** as our preferred MAT.

We now seek your views on our proposal to join to Changing Lives Learning Trust before Trustees make our final decision.

Changing Lives Learning Trust is built on the founding principle that each school is different to one another and that as a Trust it must protect that individuality and ethos in order to fulfil their vision. By doing so Changing Lives Learning Trust believe collaboration and learning is richer as a consequence.

The vision of the Trust is to ***“have legitimate grounds to claim that those we undertake to teach and train will have a preparation for life that is excelled by no other”***.

This is an incredibly powerful vision, where the vision of QEGS and Changing Lives are aligned through which together the QEGS vision can thrive. It is our proposal that QEGS will join Changing Lives Learning Trust as soon as possible and certainly before the end of the academic year.

So that you can find out more about Changing Lives Learning Trust we have developed a consultation/frequently asked questions document. More information about Changing Lives Learning Trust can also be found at: <https://changinglives.education/>

### **Consultation**

We are now initiating the consultation process with key stakeholders. Stakeholders are invited to submit their comments and questions. The responses to this consultation will be used to determine to final decision on whether to proceed with the proposal to join Changing Lives Learning Trust.

As a Trust Board we are seeking the views of:

- Pupils, Parents and Carers
- Staff and their union representatives
- The Local Authority
- Local Schools
- The Local Community
- Other interested parties

We hope this consultation document and the information found via our respective websites will help you to formulate your own views on this important proposal.

The consultation process will start immediately and conclude on 28<sup>th</sup> April 2023. Questions and comments regarding the consultation can be submitted as follows:

- **Online From:** <https://forms.office.com/e/m0bn3sNP5v>
- **Email:** QEGS.Consultation@edupi.org.uk
- **Letters:** marked ‘Private and Confidential – MAT Consultation’ and handed (or posted) to: Queen Elizabeth Grammar School, Ullswater Road, Penrith, Cumbria, CA11 7EG

In addition, consultation meetings will be held at the school as follows:

- Staff: 7<sup>th</sup> March 2023
- Parents/Carers and Local Community and Other Stakeholders: 14<sup>th</sup> March 2023 at 5.00PM at the School.

Consultation documents will also be available on our website: <https://qegs.website/>

Only once all the stakeholder comments and representations have been collated and considered will the Trust Board decide whether or not to join Changing Lives Learning Trust.

Yours sincerely,

The Trustees of Queen Elizabeth Grammar School

## Frequently Asked Questions

### 1. What is a multi-academy trust?

A multi-academy trust (MAT) is a charitable trust which is responsible for the operation of more than one academy. QEGS is currently a Single Academy Trust and proposes to join Changing Lives Learning Trust which is a Multi-Academy Trust.

The people in charge of running the Multi-Academy Trust are the company directors, who are responsible for strategic oversight and management. They are also charity trustees and must comply with duties under company law, charity law and education law to promote the success of the academy trust. They determine the policies of the trust, monitor the effectiveness of each academy within the MAT, manage central services where appropriate and report to the Secretary of State. They work to ensure that each academy is performing to the best of its ability and gets the support it requires.

The role of the Members of the MAT is largely limited to appointing and removing directors and making key decisions such as amendments to the Articles of Association and changing the name of the academy trust.

Each of the academies in the trust usually has its own local governing body which has authority delegated to it by the Trust Board.

### 2. What was our Selection Process?

Trustees have undertaken a thorough selection process to identify potential MATs.

We used a range of factors to create a long list of potential MATs. This consisted of 36 trusts that QEGS could potentially join. The following factors were then used to generate this long list:

1. Academies within 50 miles
2. Academies within 20 miles.
3. Total number of academies in the MAT
4. Number of Selective Academies
5. Age of Trust
6. HQ Location
7. Religious Character
8. OFSTED Ratings across the Trust
9. Underlying financial position

Through our consultants, EPI, we undertook a desktop evaluation of the 36 MATs which led to a shortlist of 8 potential MATs to undertake further analysis against.

Using information available publicly, each MAT was reviewed against our priorities as set out in our consultation letter. Having reviewed each MAT against our priorities we identified 4 MATs to invite Expressions of Interest from.

Of those MATs that chose to express an interest in QEGS joining them, a thorough review was undertaken of each submission against our Trust Priorities. Those MATs whose submission was deemed to align with the QEGS Trust Priorities were invited to present to Trustees their vision and the benefits their Trust bring to QEGS.

Finally, having considered all of the information available to Trustees a preferred MAT was selected to initiate a consultation with stakeholders to join.

### 3. Who are Changing Lives Learning Trust?

Please follow the link below to find out more about the Changing Lives Learning Trust.

<https://changinglives.education/>

#### **4. Why Changing Lives Learning Trust?**

Trustees set out our priorities in selecting a MAT to join and assessed each potential MAT against these priorities and we believe Changing Lives Learning Trust are the strong choice through:

##### ***Retains QEGS identity (including branding, uniform etc.)***

QEGS will fully retain our identity through our partnership with Changing Lives Learning Trust. Our brand will remain the same, uniform will remain unchanged and as a strong school joining them, QEGS cements a strong, mutually beneficial partnership within Cumbria.

All staff currently working at QEGS will continue to at the school post transfer. Excitingly, as the Trust grows there will be opportunities available for staff to progress and grow.

##### ***Compatible vision with QEGS' Vision***

Each school within Changing Lives Learning Trust has the autonomy to set its own vision within the vision of the Trust. The vision of QEGS is directly aligned to the vision of Changing Lives Learning Trust and our values are highly comparable. Both organisations are deeply rooted in the communities we serve and together we are stronger.

Changing Lives presents a huge opportunity for QEGS to be part of a growing Trust, to be able to influence and shape the growth of the Trust into the future. There are a great number of opportunities for staff development through the Teaching School Hub and National Leader of Education coordination that is already undertaken by Changing Lives Learning Trust.

Changing Lives Learning Trust and QEGS alignment mean the building and formation of a strong, local Trust to develop teaching, learning and communities across Cumbria, whilst remaining rooted to our community.

##### ***The selective nature of the school to remain***

This will remain unchanged.

##### ***Staff rights are protected, including:***

- *Abides by School Teachers Pay and Conditions (STPCD) and NJC for support staff*
- *Committed to remaining in Teachers Pension Scheme (TPS) and Local Government Pension Scheme (LGPS).*

Staff rights remain protected, including STPCD and NJC as well and members of TPS and LGPS.

##### ***Existing staff continue to work full time at QEGS***

All staff currently working at QEGS will continue to work at QEGS post transfer - with all rights and protections transferred as part of the TUPE process. Excitingly, as the Trust grows there will be opportunities available for staff to progress and grow.

##### ***Provides financial security to QEGS in the long term***

Changing Lives Learning Trust is in a strong financial position. The latest accounts as at 31/08/2022 show the Trust has having £28.7m in total reserves which includes £25.9m in building and fixed assets, £2.3m as an Endowment Fund to support education improvement and Free Reserves of £497k.

Changing Lives Learning Trust operates a top slice model to provide a range of services to schools. This percentage amounts to 6% and is calculated based upon the general annual grant allocation only. All income which is attached to the pupils, such as pupil premium, SEN, bursary funding is retained in full by the academy.

Services provided by Changing Lives include Finance (including payroll), IT, Governance, DPO, HR and Estates Management, Asset Management, Timetabling. This list is not exhaustive.

Finally, we are assured that Changing Lives Learning Trust meet the requirement of our Notice to Improve and have the capacity to repay the Grant.

### ***High level of QEGS autonomy***

- **Governance** A Local Governing Body will remain responsible for the ongoing governance arrangements locally at QEGS within the scheme of delegation which we have reviewed and are content with.  
A current QEGS Trustee will become a Trustee of Changing Lives Learning Trust.
- **Curriculum** QEGS will continue to develop our curriculum and through collaboration across the Trust we can benefit together.
- **Ethos** Children at the heart of QEGS and this is the same for Changing Lives Learning Trust. The ethos of our school will not change.
- **Behaviour** Our approach to managing behaviour remains QEGS decision.
- **Admissions** This is unchanged from current arrangements and will be determined by the Local Governing Body once the school has transferred.
- **Budget Setting** Budgets are set by QEGS, our Finance Governor and the Finance Director of the Trust Board, with final approval by the Trust Board..

### ***Low risk of being taken over by another Trust***

Changing Lives Learning Trust is an 'Approved Sponsor' by the Department for Education. Locally Changing Lives Learning Trust runs the Teaching School Hub and works with a range of national organisations to develop leadership, teaching and education practice.

The Trust is in a strong financial position.

It is our assessment that the Trust is a low risk of future takeover.

### ***A local presence and clear understanding of the school, local and county context***

As discussed already, Changing Lives Learning Trust is rooted in the community and its desire is to work in partnership with a group of school to deliver outstanding education. In achieving this it will work with the community, parents, staff and students to ***have legitimate grounds to claim that those we undertake to teach and train will have a preparation for life that is excelled by no other.***

### ***Encourages collaboration between schools – not central control.***

Changing Lives Learning Trust has a small central team built to help schools with key systems and processes, such as Finance, HR and IT. The CEO is a huge enabler of fostering collaboration between schools in the Trust and externally.

QEGS already works with a number of the organisations that Changing Lives works with too so there is strong strategic alignment. As a Beacon of Excellence, QEGS can help other schools within Changing Lives and together build an incredibly strong Trust.

## **5. Whose decision is it whether or not to join a MAT?**

The decision to join a MAT and which MAT to join rests with the Trust Board of Queen Elizabeth Grammar School, with approval also being needed from the Regional Director that act on behalf of Secretary of State for Education.

#### **6. Has the decision already been made to join a MAT?**

No. The Trust Board are currently seeking views from all stakeholders and these views will be considered before any final decision is made. However, it is worth noting that as a condition of the Notice to Improve issued in November 2022, QEGS is obliged to join a Multi Academy Trust.

#### **7. Who will the Trust Board be consulting?**

The Trust Board will be consulting with all staff at the school, parents and various other stakeholders, other local schools and other community members.

#### **8. How can I share my views?**

You can share your views through the following means:

- **Online From:** <https://forms.office.com/e/m0bn3sNP5v>
- **Email:** QEGS.Consultation@edupi.org.uk
- **Letters:** marked 'Private and Confidential – MAT Consultation' and handed (or posted) to: Queen Elizabeth Grammar School, Ullswater Road, Penrith, Cumbria, CA11 7EG

#### **9. The question I want to ask is not in the FAQ document. How can I ask my question and get an answer?**

Questions can be submitted through e-mail or by letter as described above.

#### **10. Can other schools join the MAT at a later date?**

Yes, other schools can join at a later date, however at the early stage of growth QEGS can, alongside the existing schools, be influential in the future growth of the MAT. Likewise, taking this route satisfies the requirement of our Notice to Improve.

#### **11. What changes will parent/carers see?**

There will be very little visible change as a direct result of joining a Changing Lives Learning Trust, with the school continuing in much the same way as it does now with the same Headteacher and senior staff, teachers and support staff.

We would welcome your views, whether positive or negative, on the proposal. The consultation period will run from 1<sup>st</sup> March 2023 until 28<sup>th</sup> April 2023 and comments must be received by this time.