



Strategic Plan 2023 – 2026

The Hales Valley Trust strategic plan covers the period 2023-2026. This plan sets out our 3-year strategic aims, objectives, and key performance indicators.

The Board of Directors is determined that our Trust continues to build on the solid systems and processes that are now well embedded across our Trust to deliver the very best educational experience for all our children.

This plan sets out how we will support and improve our schools, including those schools who are interested in joining us, across the wide geographical area of Dudley, the Black Country and beyond.

Our focus will remain on improving outcomes for children, both academic and personal, developing our leadership and governance, improving teaching, and learning and establishing strong curriculums that successfully prepare our children for life beyond primary school.

We have a strong and effective team that are well placed to move the Trust forward into a period of growth. We are determined to ensure that our vision is reality for our children.

Vision: Success for All

Everyone in our Trust community is valued, supported, and encouraged to do their best and be successful.

Our culture is driven by our 3 core principles:

Respect:

- We are honest and kind to ourselves and to each other
- We listen to and consider each other's points of view
- We look after our environment

Resourcefulness

- We think of new ways of solving problems
- We work well with others
- We aim to be the best we can

Resilience

- We always try our best
- We embrace new challenges and opportunities
- We have a positive attitude



To support us to deliver on these principles we will work on the following strategic areas over the next 3 years which are based on the April 2023 DfE Trust Quality Descriptors :



Rationale: why focus on these areas?

Governance and Leadership: *why?*

Good leadership is essential to any organisation.

Good leadership at all levels is crucial to ensure that the Trust is focused and delivering on the right areas – improving the life chances of our children.

We want to ensure that we make the very best use of our most effective leaders, giving them opportunities to have a wider impact on the Trust beyond their own schools and giving our emerging leaders opportunities to grow and develop so that we retain high quality staff.

We know that the development of our staff is important. Through our CPD programme, leadership forums and well-being forums we will ensure that our staff are well supported, with opportunities for growth and development. Our staff are our biggest asset and we need to look after them.

This will ensure that our Trust remains strong and that our children benefit from a high-quality education.

School Improvement and high-quality inclusive education: *why?*

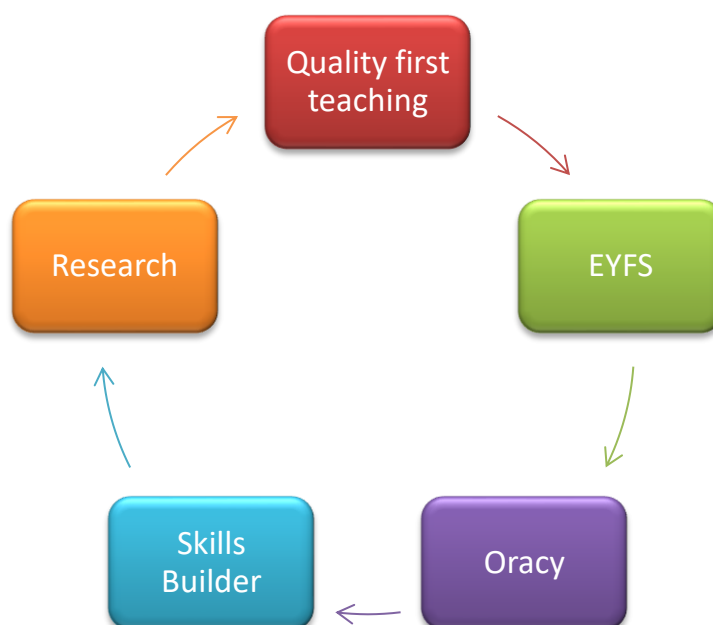
Our Trust exists to improve outcomes for children.

We want to continue to develop our practice through sharing best practice from across the Trust and beyond, utilising the latest and most effective research.

A high level of staff expertise already exists across the schools in the Trust – we now need to make best use of this to ensure that we continue to learn from best practice.

We need to be very clear on identifying the areas for improvement and having a suitable plans and support in place that correctly identifies what needs to happen to further improve.

To improve teaching and learning our Headteachers will lead on key Deep Focus areas for the Trust. This will ensure a common language for school improvement:



Personal Development: *why?*

Academic outcomes are crucial for our children and we need to ensure that the children leave primary schools with the necessary knowledge, skills and understanding in reading, writing and mathematics.

Whilst important, these are not the only outcomes we think are essential.

We want our children to be confident and successful learners, benefiting from a curriculum that gives them opportunities to grow and develop as learners, leaders and individuals.

This is why we will implement the Skills Builders framework throughout our curriculum across all our schools, focusing on the following areas:



Underpinning Skills Builder will be a strong drive to improve the oracy skills of our children.

We want our children to have the skills and confidence to be able to speak clearly, expressing their views articulately and listening with intent to each other.

We want our children to learn in a language-rich environment that will support their reading and writing skills.

Improving Outcomes: *why?*

Our children need to be able to be successful learners in order to maximise their life chances.

We need to equip them with the necessary skills and knowledge for them to be able to move successfully into secondary school and beyond.

Good leadership, good teaching, effective school improvement and a rich and meaningful curriculum will ensure that outcomes improve or remain high for all our children.

Workforce, Finance and Operations: *Why?*

The Trust central systems and procedures are there to provide core support for our schools.

Our school leaders need to be entirely focused on school improvement so the central functionality needs to be robust, efficient and timely.

We need to ensure that we always get best value, ensuring that our funds are correctly channeled towards improving outcomes for children.

Financial and operational systems and procedures need to be robust and efficient to be able to support future growth of the Trust.

Strategic Aim 1: Governance and Leadership

	Key Strategic Areas	Key Performance Indicators
1.1	Leadership and governance at all levels is effective and leads to an improvement in standards, including safeguarding, and quality of provision for all children	<ul style="list-style-type: none"> ▪ The board and executive leadership team anchor the trust’s strategy in the needs of its schools, the communities they serve and the wider educational system in line with its charitable objects. ▪ The Accounting Officer, board and leadership team create a culture of ethical leadership, including the Seven Principles of Public Life. ▪ Leaders are making best use of data, through diagnostic testing, internal testing and statutory testing, in order to inform next steps for improvement <p>Exemplar evidence</p> <ul style="list-style-type: none"> ▪ Ofsted reports: where there is relevant information, for example within consideration of Leadership and Management ▪ Minutes of half termly CEO and Director of Education meetings
1.2	The Trust is effectively developing and utilising the skills of the leaders across the Trust in order to impact on improving outcomes for children	
1.3	Leaders are relentlessly focused on improving the quality of teaching	
1.4	Effective professional opportunities in place in order to develop and retain leaders at all levels	
1.5	The health and well-being of our staff is prioritised and actively promoted by leaders in the Trust ensuring that we have a happy, valued and productive workforce	

Strategic Aim 2: Workforce

	Key Strategic Areas	Key Performance Indicators
2.1	To ensure that there is a clear Trust educational approach to improvement for all schools in the Trust – based on theorized models	<ul style="list-style-type: none"> ▪ As a legal entity which is independent from local government, school trusts (like universities and NHS Trusts) have a wider civic responsibility to advance education for the public good in the communities they serve. Hales Valley has demonstrated they commit to contribute to the sufficiency and quality of education in the area. ▪ Creates a high-performing working culture for all staff that promotes collaboration, aspiration and support. Uses the flexibilities of the trust structure to create opportunities for staff. Recognises the critical value of high-quality teaching and champions the profession. ▪ Encourages and enables all staff to build their expertise through evidence-based professional development and mentoring. ▪ Builds an innovative and vibrant community of professionals, collaborating across schools and other trusts to develop and share expertise and evidence-based practice. <p>Exemplar evidence</p> <ul style="list-style-type: none"> • Teacher retention: percentage of teachers leaving the state-funded school system • Teacher retention: percentage of teachers leaving the trust • Leadership retention: percentage of leaders leaving the state-funded school system • Leadership retention: percentage of leaders leaving the trust • Teacher experience: percentage of teachers with less than three years' experience • Continuing Professional Development: percentage take-up of National Professional Qualifications • Continuing Professional Development: how the trust is improving quality in its workforce, especially the quality of teaching
2.2	To ensure accurate and robust self-evaluation through quality assurance activities	
2.3	To ensure quality first teaching to provide high quality learning	
2.4	To annually evaluate each school's curriculum to ensure National Curriculum compliance / develop a scalable curriculum across groups of schools	
2.5	To scale improvement by knowledge-building, evidence-informed professional development and creating communities of improvement	
2.6	To effectively utilise links with external partnerships, other Trusts and professional bodies in order to support areas for development and engage in professional research	
2.7	Work with other civic actors to contribute to the sufficiency and quality of education in the area (Trust council, charities, food bank)	

Strategic Aim 3: High Quality and Inclusive Education

		Key Performance Indicators
3.1	Curriculum - Oversees the design and implementation of ambitious, broad, well sequenced and knowledge rich curricula in all of its schools	<ul style="list-style-type: none"> ▪ A well-constructed curriculum leads to good results because those results reflect what pupils have learned. Therefore, the curriculum contributes to evidence of impact. ▪ Outcomes for all children in reading, writing and mathematics improve or remain high ▪ Outcomes for all children in reading, writing and mathematics are at age-related expectations or above at the end of KS2 ▪ Children meet or exceed expected progress from Key Stage 1 to Key Stage 2 in reading, writing and mathematics ▪ Each school makes best use of additional government funding to meet the needs of pupils ▪ Support in place for children who are at risk of underachieving, or are vulnerable, providing timely and effective intervention ▪ Prioritises effective behaviour and attendance policies and consistent practice to create a safe environment in which to work and learn ▪ Fosters a supportive working environment by managing workload, prioritising wellbeing and taking action to support all staff. ▪ Ensures all children leave its schools well prepared for the next stage of education, employment or training and prepared to become confident citizens. ▪ Attendance: persistent absence in trust schools below national and where it is not there are robust systems in place to improve it. ▪ A range of external partners are involved in the delivery of the Trusts statutory functions. <p>Exemplar evidence</p> <ul style="list-style-type: none"> ▪ KS1 Phonics pass rate (%): percentage of pupils meeting the expected standard in phonics ▪ KS2 RWM (%): the percentage of pupils meeting expected standard in Reading, Writing and Maths ▪ KS2 Reading progress: pupils' average progress in English reading ▪ KS2 Writing progress: pupils' average progress in English writing ▪ KS2 Maths progress: pupils' average progress in mathematics ▪ Ofsted reports: providing a rounded assessment of the quality of education, behaviour and attitudes, personal development and leadership and management ▪ Regions Group conversations with both the Trust and LA: this establishes how well the Trust collaborates in areas such as SEND/AP, admissions, sufficiency, safeguarding and attendance – these conversations will take place on a risk-based basis and will be informed by evidence ▪ Good/Outstanding schools in trust (%): percentage of schools in the trust with a Good/Outstanding Ofsted judgement ▪ Recent track record: number of schools with Requires Improvement/Inadequate judgments that have improved to Good/Outstanding under the trust in the past five years ▪ Improvement in outcomes for pupils with SEND to be in line or exceed national expectations ▪ Trauma informed practice underpins our nurture provision in order that all children can succeed
3.2	Student outcomes - Achieves good outcomes for all its students by delivering education that is both high quality and inclusive	
3.3	Accessible for all – Operates fair access, welcomes and effectively teaches disadvantaged children and children with SEND from their local areas	
3.4	Inclusive pastoral support – support students and schools to address issues so students can stay in mainstream school where possible support students to rejoin mainstream education when they have spent time in alternative provision	
3.5	Enrichment – Enables children to take part in sports, music and cultural opportunities that enrich the curricular and support children wider development	
3.6	Behaviour and Attendance – ensures it schools are places where all students attend regularly, are kept safe, feel calm and supported and are able to actively participate and progress	
3.7	Destinations: ensures that all pupils leaves it schools well prepared for the next stage of education, employment or training and prepared to be confident citizens.	

3.8	Collaboration: Works collaboratively with schools, trusts, LAs, Diocese, parents and other civic partner to ensure the delivery of statutory functions and acts in the wider interest of the wider community	<ul style="list-style-type: none"> ▪ Trained Senior Mental Health Leads to lead wellbeing plan across all schools ▪ All schools to be awarded 'good' via the skillsbuilder framework ▪ All Voice 21 projects delivered
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Strategic Aim 4: School Improvement (Trust Growth)

	Key Strategic Areas	Key Performance Indicators
4.1	Develop an effective and efficient process for onboarding new schools	<p>Growth</p> <ul style="list-style-type: none"> ▪ 2023-2024 – Gig-Mill to convert ▪ 2024 – Spring Withymoor to convert ▪ 2024 -2025 – Work with local and regional team to identify further partners to begin a Trust Partnership - with a view to convert in 2026 <p>IT</p> <ul style="list-style-type: none"> ▪ IT infrastructures align with the Trust IT strategy <p>Governance</p> <ul style="list-style-type: none"> ▪ Integration of External Governing Bodies into existing structures has been completed successfully <p>Exemplar evidence</p> <ul style="list-style-type: none"> ▪ Internal audit – Capacity for Growth Summer 2023 – redo in 2024/25 ▪ Successful induction of DFO to enable smooth due diligence process and conversions

Strategic Aim 5: Finance and Operations

Key Strategic Areas		Key Performance Indicators
5.1	Compliance and Efficiency a) Deliver financial viability b) Develop financial integrity	<ul style="list-style-type: none"> ▪ Public money is spent in accordance with the appropriate legislation, funding agreement and ATH as well as in compliance with the trust's internal procedures. (Regularity) ▪ Expenditure and income are dealt with in accordance with Parliamentary intentions and the principles of parliamentary control. This covers standards of conduct, behaviour and corporate governance. It includes fairness, integrity, avoidance of private profit from public funds and even-handedness in the appointment of staff (Propriety) ▪ Economic, efficient and effective use of available resources to achieve the best possible educational and wider societal outcomes. (Value for Money)
5.2	Marketing	<ul style="list-style-type: none"> ▪ Business and pecuniary interests of the accounting officer must be declared and published on the trust's website whether they are a trustee or not ▪ Employment practices will promote equality, diversity and inclusion, including ethical practices of recruitment and retention of all staff. ▪ All Trust activities achieve the most efficient, effective and sustainable provision of education to the highest quality.
5.3	People Strategy	<ul style="list-style-type: none"> ▪ There is equity in access to high quality professional development, aligned to balance organisational and individual needs. ▪ There is a strong talent management and succession planning programme across the Trust. ▪ Ensures inclusive working environments, supports flexible working and takes action to promote equality and diversity. ▪ Climate Education: All children have a better understanding of climate changes. All children have a greater connection with nature. ▪ Green Skills and Careers - To harness the children's passion and interest around climate change and sustainability to develop the knowledge and skills required for green jobs – link to skills builder.
5.4	Sustainability Strategy	<ul style="list-style-type: none"> ▪ Education Estate and digital infrastructure - To create a sustainable education estate of schools that is resilient to the impact of climate change. Improve the physical environment in and around education settings to positively impact on the physical and mental wellbeing of children and adults. ▪ Operations and supply chains - To encourage our children to drive change by introducing children to more sustainable practices such as: The circular economy, Waste prevention, Resource efficiency. To instill habits of a lifetime. <p>Exemplar evidence</p> <ul style="list-style-type: none"> ▪ Current and future financial trends through consideration of academy trusts ▪ Budget Forecast Returns and Account Returns: this identifies trusts with either low or very low volatility over time, coupled with stable finances as evidence of financial strength. ▪ Low ratio of assets-to-liabilities: this is a widely recognised financial indicator that looks at total-debt-to-total-assets ratio and compares the total amount of liabilities of a trust to all of its assets. Higher ratios indicate more debt.

Leadership and Governance

As a Charitable Trust our Board ensures that they comply with charity and company law requirements. The Board of HVT has three core functions:

- Set the strategic direction of the organisation
- Hold executive leaders accountable for the educational performance of the organisation and its pupils
- Oversee the financial performance of the Trust, ensuring its money is well spent.

As a Multi Academy Trust, the Board of HVT is responsible for all the schools in the Trust. We do this by delegating functions to the Local Governing Committee of each school through a Scheme of Delegation. Where a school does not have a Local Governing Committee (these schools will need extra support on conversion and will be RI or SM), then these delegated functions are carried out by the Education Advisory Group, which is led by the CEO.

Earned Autonomy

HVT believe that the best results will be achieved when each individual school's leadership and LGC or EAG receives the level of responsibility and autonomy that is appropriate to their specific circumstances. We operate a standardised, alignment and autonomy, model, whereby it is clear what is expected strategically and operationally in all schools regarding systems and processes in the Trust.

Where a school is not yet Good or Outstanding, there will be closer supervision of the school by HVT through its Educational Advisory Board (EAG), its central officers and the school improvement team. EAG meetings will take place every 6 weeks to ensure that the school remains on track. Those that are Good or Outstanding will receive lighter touch supervision and support so that the LGC will operate with maximum autonomy.

For local governing committees to carry out their role effectively, governors must be:

- Prepared and equipped to take their responsibilities seriously
- Accountable to the Trust Board
- Supported by the appropriate authorities in that task
- Willing and able to monitor and review their own performance

- Willing to engage in training and development

We would expect the core business of each LGC/EAG to be:

- Reviewing and monitoring the school improvement plan and curriculum
- Monitoring and reviewing progress and attainment
- Ensuring all statutory duties are fulfilled

We have a comprehensive Governor Handbook in place which clearly sets out the membership, terms of reference and code of conduct for all our members, Directors and Governors, to which all comply. Our Trust CPD programme sets out how the Trust will provide opportunities and training for all staff across the Trust. This includes a strand for governance which enables training to take place from point of induction all the way through to Members and Directors.

School Improvement Strategy

Our approach to school improvement

HVT uses the in-house strength we have across the Trust as our major resource for school improvement. These include CEO/DOE/SLEs and utilising key senior staff from across the Trust and Central team and the Hales Valley Teaching Hub. Support will be deployed as necessary, with more intense support offered upon conversion and during the first year.

The School Improvement Model

The Trust provides a comprehensive package for school improvement which:

- Is tailored to each individual school and is in response to contextual understanding of the challenges faced
- Brings about rapid improvement and builds capacity
- Draws upon research and is supported by an evidence base
- Is provided by quality assured professionals who respect and build capacity and confidence
- Maximises the use of school-to-school support
- Articulates high expectations of teachers and learners

The Trust package currently comprises:

- Support and challenge from CEO and DOE and key Trust leaders
- Support for self-evaluation, data analyses and for school improvement planning
- Facilitated peer to peer reviews with Senior Leadership - whole school or phase specific
- Secondments of key staff to secure improvement
- Annual safeguarding review with follow up visits

- A comprehensive Trust CPD programme that details what support and opportunities staff at all levels can expect
- Annual ECT programme
- Annual ECT+1 programme
- A termly moderation programme for staff: EYFS, Y2, Y4 and Y6
- Common assessment processes across all schools to input and analyse data
- Key Trust assessment data is collected and shared termly: GLD, Y1 phonics, Y2 RWM, Y6 RWM
- Trust staff forums to develop and share good practice:
 - Headteacher
 - Deputy Headteacher
 - SENDcos
 - EYFS
 - Y2/Y6/Y4
 - English and maths leaders
 - ICT leaders
- Shared INSET where appropriate
- All schools have CEO/DOE SIP visit termly
- Good/outstanding schools have LGC meetings every term, attended by CEO and Chair of Board of Directors
- RI/SM schools have EAG meetings every half term, led by CEO and attended by Chair of Board of Directors
- Ongoing challenge and support by the DOE
- Headteacher appraisal
- Headteacher mentors for new Headteachers in post

The Geography and Communities we serve:

Currently our schools all come from within the Dudley Metropolitan Borough. Our schools serve a wide range of communities from more affluent areas to areas of high deprivation. Dudley is very urban in nature and is near Sandwell, Birmingham, Walsall and Wolverhampton and its wider neighbours of Staffordshire and Worcestershire.

Our schools:

- Hurst Hill Primary
- Lapal Primary
- Lutley Primary
- Priors Primary
- Woodside Primary



Growth: Attracting Schools

A key aim of HVT is to have high performing schools as part of our family of schools. We accept that each school will be at a different starting point in their journey of improvement and we will work collaboratively to achieve our objective.

Our improvement approach is for schools to support schools and to achieve this we aim to attract Good or Outstanding schools into our Trust. Our engagement of these schools will focus on:

- Communicating the benefits of being part of HVT
- Developing relationships through networking, Teaching Hub and school to school support
- Offering business services to schools

The Board of Directors will work together to identify schools who benefit from joining the Trust. These schools will typically be those that are performing well (i.e., Good or Outstanding) but may not have the capacity to achieve greater flexibility in driving forward improvements in non-teaching activities. The infrastructure of the Trust will take away the burden on schools to manage support services and allow them to focus on effective teaching and learning as well as having the opportunity to deliver school to school support across our family of schools. For these types of schools, we will also offer the following as a way of attracting them into our Trust.

- A flexible Scheme of Delegation for their LGC to continue to lead and manage the school
- A chance to generate income & lead our school improvement by offering school to school support, CPD for all staff
- Stability in a fast-changing educational landscape
- Access to shared services & economies of scale

The Trust is inclusive and, as such, will always be open to working with and supporting vulnerable schools as well as good and outstanding schools.

Our Services

Managing schools brings financial challenges and responsibilities that would not be considered within a Local Authority, our cost-effective infrastructure eases the burden on our schools. We provide the following services:

Financial

- Bespoke professional advice, support and training
- Comprehensive suite of core financial policies, ensuring compliance with statutory responsibilities
- Preparing financial statements in line with the Department for Education (DfE) and Education and Skills Funding Agency (ESFA) requirements
- Accounting Officer and Responsible Officer reporting
- Budget preparation and monitoring
- Monthly/quarterly management accounts
- Software and processes training for school finance staff

Operational

- Bespoke professional advice, support and training
- Comprehensive suite of core Trust policies, ensuring compliance with statutory responsibilities
- HR support & consultancy
- Recruitment support
- Payroll and contract support
- Health & Safety support
- Legal support and advice
- Brokerage of insurance
- Bid writing support
- Brokerage of other core services on request
- Academy conversion from start to completion

Governance

- Annual calendar of meetings with set agendas
- Bespoke professional advice, support and training
- HVT bespoke Governing Body Handbook
- Comprehensive suite of core Trust policies, ensuring compliance with statutory responsibilities
- Professionally clerked meetings
- Suite of support materials to assist in the governance role
- Access to professional bodies such as National Governors Association
- In-house and online training