



Value for Money Statement

Academy trust name: Bridgwater College Trust

Trust Company number: 8098956

Year ended 31 August 2014

I accept that as accounting officer of Bridgwater College Trust I am responsible and accountable for ensuring that the academy trust delivers good value in the use of public resources. I am aware of the guide to academy value for money statements published by the Education Funding Agency and understand that value for money refers to the educational and wider societal outcomes achieved in return for the taxpayer resources received.

I set out below how I have ensured that the academy trust has used the resources provided and secured good value for money during the academic year.

For the year ended 31 August 2014 the Trust was a Multi Academy Trust, incorporating the All-Through Academy, Bridgwater College Academy (BCA) and the newly converted Brymore Academy (Brymore) and Hamp Academy (Hamp).

The Trust has ensured that educational standards improve for the benefit of pupils and that all pupils have the opportunity to raise their individual levels of attainment within the three very disparate and distinct academies each facing their own challenges.

Bridgwater College Academy

Improving educational outcomes:

Raising student attainment is demonstrated by the four year trend in exam results at KS4, with results for 2013/2014 being the best yet for the Academy. The percentage of pupils achieving 5+ GCSEs at A*-G is now 96% (up 3% in comparison to 2012). The percentage of pupils achieving 5+ GCSEs at A*-C including English and Maths is now 42.5% (up 18.5% in comparison to 2012).

On the previous measure (where certain vocational subjects were included in the measure) this would have been 49%. All measures exceeded the floor targets of 40% this year.

An advantage of being an all-through academy is that work is being done at primary level to accelerate progress and improve results achieved at KS3 and KS4. There was a large focus on transition between the end of KS1 and the start of KS2 which is already resulting in students making accelerated progress. For Key Stage 2 there was a 7% increase in the percentage of students gaining level 4+ in Reading, Writing and Maths, which resulted in KS2 results being above the floor standard for the first time ever. For Key Stage 1 over 87% of students made expected progress in Reading, Writing and Maths.

Context:

Bridgwater College Academy is an all-through school of 1196 students from age 3 to 16. It is the first all through School in Somerset and opened in September 2012. There are 575 students in the secondary phase and 621 students in the primary phase. The Academy also includes nursery provision. The Academy is sponsored by Bridgwater College and sought out its own sponsor for Academy conversion. It is comprised of three predecessor schools. East Bridgwater Community School, Sedgemoor Manor Junior School and Sedgemoor Manor Infant and Nursery School. No floor standards were ever met by either of the predecessor schools at Key Stage 4 or 2.

The school is situated in an area of significant social disadvantage, bordered by a large council estate which has a social deprivation indicator of -0.3. The IDACI index places the school in the top 7% of socially deprived wards in the country (ranked 1431/32482) and Local Authority data indicates that the school serves the most socially deprived catchment in the Authority. Census data confirms high levels of social deprivation with few adults in HE (4.5% from main ward

compared to 29% nationally) which is significantly below the national average. The Wealth Poverty Index scores the school at minus 676 points. Over a third of students are eligible for Free School Meals however this number varies throughout the year and phase. The Academy attracted £676,000 for Pupil Premium in 2013-2014 which is significantly higher than the national average.

The Academy acknowledges the context of its setting and is insistent on high expectations of all who attend. We recognise that many students have limited life experiences and expectations. Many students are not ambitious academically and this can be a significant barrier to learning which the Academy is working hard to dismantle.

In the recent Ofsted section 8 monitoring inspection (September 2014) it was acknowledged that the school has devised and implemented high quality action plans to drive improvement, and that changes have been made to leadership roles and responsibilities. The new regional School s Commissioner for the South West, David Carter visited the school and was satisfied with the work being done.

Aids to raising performance

- There is now a stronger and more settled Senior leadership in place across Primary and Secondary phases.
- School improvement plans have been effective in raising standards at all ages, there is a strong and clear vision embedded across the Academy relating to raising standards, narrowing the gap in attainment and improving life chances.
- The local perceptions of the Academy are changing and parent and community participation has increased.
- There is now a very positive ethos within the staff team. The school has in place very robust and unique arrangements for professional development of teaching staff. Monitoring of teaching and learning is very rigorous.
- Pupil premium funding is significantly above the national average and is principally generated through the very high number of students on Free School Meals (FSM). The priorities for the deployment of the pupil premium funding is to address inequalities in attainment outcomes for those students from a disadvantaged background and to raise the aspirations and self-esteem for those students who attract the pupil premium. This is achieved by overstaffing the primary phase to reduce class sizes and facilitate more targeted teaching.
- The Academy has a strong Sponsor in place that is enthusiastic for the Academy to be successful.
- The Academy possesses a talented and motivated teaching staff.
- Financial management is strong and the Academy is in a strong position financially.
- There is now very strong leadership of Special Education Needs (SEN) across all phases of the Academy. This was further enhanced in January 2014 with the appointment of a new Primary SENCO.

Barriers to further success

- The Academy is situated in an area of very high deprivation.
- There are low levels of aspiration for children generally from the parent body which itself has low levels of educational success.
- There are very high levels of inter-generational unemployment and worklessness as reflected in our FSM figures
- Mobility levels are high in 2014.
- There are high levels of anti-social behaviour from parents directed at staff.

- The academic profile of all cohorts in the Academy is significantly behind national expectation and entry level assessments are very low (0.8% for reading, at age related expectation on entry).
- Over 50 families are involved in the 'troubled families' programme.
- Recruiting good teachers has been a challenge in 2014 in the Primary phase as the academy expanded in size.
- Very high percentage of students have SEN or FSM.

Targeted improvement:

Resources have focused on ensuring that the key weaknesses identified from the predecessor schools are being addressed. These include:

- Attainment and progress in GCSE English.
- Attainment and progress at the end of KS2.
- Accelerated progress across KS1.
- Teacher development leading to better learning and standards.
- Curriculum development.
- The well-being of young adults.

Focus on individual pupils:

Resource has been targeted at individual pupils and groups of pupils. The gap between FSM and non-FSM students at the end of KS2 closed, in some cases significantly, across all measures. Similarly, at the end of KS4, the gap across some measures narrowed markedly. However, with the significant uplift in attainment, non FSM pupils continue to make much better progress and achieve far better than FSM students. Narrowing the gap remains a priority for the current academic year.

The achievement of pupils at Key Stage 4 is one of rapid and sustained improvement reflected in exceed floor standards in 2014 for the first time in the history of the Academy and its predecessor school.

Over 95% of BCA students progress to Further education at Bridgwater College, reducing the number of NEETs (those not in employment or further training).

Collaboration:

The trust continues to engage with other educational providers and experts to share delivery or good practice, and to drive up standards. This includes working closely with our sponsor; Bridgwater College, with Key stages 2, 3 and 4 and with other academies within the same multi-academy trust. Links with other schools and academies in Somerset remain strong, we continue to work with the Bridgwater Education Trust and the Somerset Challenge. The Academy has taken out membership of the PiXL group to collaborate more widely with high achieving schools.

New Initiatives:

As noted above the extra pupil premium has been used to reduce class sizes and facilitate targeting teaching to reduce the gap between pupils with and without pupil premium.

Quantifying Improvements:

As noted previously the attainment levels for pupils at key stage 4 has increased dramatically over the previous 5 years. Data is available that shows students progress in Key Stage 1 and Key Stage 2 and comparisons made with national expected progress (4 points for KS1 and 3 points for KS2). Years 2,3,4 and 6 all made more than national expected progress. Years 1 and 5 did not make sufficient progress. These areas are being targeted for additional support in the year 2014/15.

Behaviour has also been improving over time and in the Ofsted report it was deemed Good.

Hamp Academy

Improving educational outcomes:

Raising student attainment is demonstrated by the five year trend in exam results at KS2, with results for 2013/2014 being the best yet for the Academy. The percentage of pupils achieving 4+ in writing (85%) and maths (88%) was above the national average. For reading this was 73%, which was lower than the national average. Six children missed a level 4 by two marks and four children missed a level 4 by one mark. Spelling and Reading has become an even greater focus within the Academy. These figures are particularly impressive given that 46% of the cohort had Special Education Needs (SEN) and 14% of the cohort were English as an Additional Language (EAL). In terms of progress, 98% made expected progress in Writing and 95% in Maths, both above the national averages. For Reading 73% made expected progress. The percentage of children achieving more than expected progress is higher than the National Average in all subjects apart from Reading. All marking was moderated by a county moderator.

Context:

Hamp Academy is a junior school that had only previously reached floor targets on one occasion, prior to conversion as an academy, this was the first year that the current Head was employed at the school. In 2009 the percentage of pupils achieving 4+ in Writing was 25%, Maths 73% and Reading 67%. There has been a steady increase in attainment over the period. The Academy acknowledges the context of its setting and is insistent on high expectations of all who attend. We recognise that many students have limited life experiences and expectations. Many students are not ambitious academically and this can be a significant barrier to learning which the Academy is working hard to dismantle. Part of the Action Plan has been to develop a wider and enriched curriculum for the pupils, with various visits and a range of lunchtime and 21 afterschool clubs being run.

Aids to raising performance

- School improvement plans have been effective in raising standards across, there is a strong and clear vision embedded across the Academy relating to raising standards, narrowing the gap in attainment and improving life chances.
- The local perceptions of the Academy are changing and parent and community participation has increased.

- There is now a very positive ethos within the staff team. The school has in place very robust and unique arrangements for professional development of teaching staff. Monitoring of teaching and learning is very rigorous.
- The Academy has strong school to school support in place from a large Outstanding Primary School. The Sponsor, Head teacher, Governing body and all staff are enthusiastic and committed for the Academy to be successful.
- The Academy possesses a talented and motivated teaching staff.
- Financial management is strong and the Academy is in a strong position financially.
- There is now very strong leadership of SEN across the Academy.
- The Head teacher has sought informal partnerships with other schools, both locally, nationally and internationally

Barriers to further success

- The Academy is situated in an area of very high deprivation.
- The Somerset Schools Information Dashboard (SSID) ranks the Academy as the fourth most challenged primary school in Somerset. This is due to its high percentage of SEN, EAL, Free School Meals (FSM) and pupil premium (PPM)
- There are low levels of aspiration for children generally from the parent body which itself has low levels of educational success.
- There are very high levels of inter-generational unemployment.
- Historically there was high levels of anti-social behaviour from parents directed at staff. This is improving due to the proactive nature of the Senior Leadership Team
- The academic profile of all cohorts in the Academy is significantly behind national expectation and entry level assessments are very low.
- Very high percentage of students have SEN or FSM.

Targeted improvement:

Resources have focused on ensuring that the key weaknesses identified from the predecessor schools are being addressed. These include:

- To continue to raise standards and accelerate progress in Reading, Writing and Mathematics and attainment and progress in Reading.
- To match pupils' abilities to tasks so that they make as much progress as they can.
- Teacher development leading to better learning and standards including learning walks.
- Involving parents and carers more in their child's learning.

Focus on individual pupils:

Resources have been targeted at individual pupils and groups of pupils. Narrowing the gap remains a priority for the current academic year and ensuring that the most able children are reaching their full potential and achieve more Level 5's and Level 6's at the end of KS2.

Collaboration:

The trust continues to engage with other educational providers and experts to share delivery or good practice, and to drive up standards. This includes working closely with our sponsor;

Bridgwater College and the other academies in the multi academy trust. The Academy has very strong links with a National Leader of Education who has advised the head since before conversion on issues such as raising teaching standards and training.

New Initiatives:

A new deputy Head was appointed in September 2014. Governors have been assigned areas of priority and are encouraged to conduct learning walks as well as assisting with reading to pupils. Hamp has also been looking at applying for Healthy schools and dyslexic school status and has applied for the artsmark award and is awaiting validation.

Quantifying Improvements:

As noted previously the attainment levels for pupils has increased dramatically over the previous 5 years, most notably the year prior and after conversion. Data is available that shows pupils' progress and attainment in Key Stage 2 as noted above. Data is also kept of exclusions and attendance, all of which have been improving over the last few years.

Brymore Academy

Improving educational outcomes:

The percentage of pupils achieving 5+ GCSEs at A*-C including English and Maths was 17%. If Agriculture and Horticulture had been included this would have been 30%. Brymore has been severely affected by Agriculture and Horticulture not counting in the performance measures. In terms of progress though, Brymore continues to do exceedingly well, with 76% making at least 3 levels of progress in English and 57% in Maths .Brymore has the lowest intake (bottom 3% ability group nationally for English). There were no high ability pupils in the academy. Added value scores continue to be high. The value added score from RAISE has been a rising three year trend from 1001.1, 1010.3 and 1013.5. The 5A*-C EM Contextual Value Added (CVA) figures places the school in the top 26% of schools nationally. The Regional Schools Commissioner has recently visited the school and was suitably impressed with the academy and what it is achieving for the boys.

Context:

Brymore Academy is a state boarding school for boys specialising in Agriculture and Horticulture with an in-house teaching farm. Prior to becoming an academy Brymore had a number of major upheavals, largely as a result of poor examination results. It has had a complete replacement of the Senior Leadership Team since 2010. In 2013 financial constraints led to restructuring and redundancy, and the school became a sponsored academy in September 2013. Six million pounds worth of building work has taken place in the last five years comprising new boarding and teaching facilities. A further £600,000 of investment has been secured to build a new dining hall in 2015. To further support the long term financial security of the academy, Brymore admitted year 7 boys for the first time in September 2014. Having boys for two more years will enable the excellent progress to be consolidated and help raise the level of attainment by year 11.

Agriculture and Horticulture represent the heart of the schools ethos and the school has a national reputation of excellence in these areas. Both subjects deliver excellent examination results which enable students to progress in their chosen career path in year 12 and beyond. Removing these subjects from the curriculum would destroy the very essence and unique

appeal of Brymore which serves not only a need nationally but a significant sector within Britain. The decision has therefore been taken to continue to deliver both subjects to the majority of students, despite the clear ramifications regarding league tables that will result.

Aids to raising performance

- There is now a stronger and more settled Senior leadership in place
- School improvement plans have been effective in raising standards there is a strong and clear vision embedded across the Academy relating to raising standards, narrowing the gap in attainment and improving life chances.
- There is now a very positive ethos within the staff team. The school has in place very robust and unique arrangements for professional development of teaching staff. Monitoring of teaching and learning is very rigorous.
- The Academy has a strong Sponsor in place that is enthusiastic for the Academy to be successful.
- The Academy possesses a talented and motivated teaching staff.

Barriers to further success

- The academic profile of all cohorts in the Academy is significantly behind national expectation and entry level assessments are very low.
- Recruiting good teachers has been a challenge in 2014 particular for Maths.
- A very high percentage of students have SEN or FSM.

Targeted improvement:

Resources have focused on ensuring that the key weaknesses identified from the predecessor schools are being addressed. These include:

- Triple Impact Marking.
- Literacy
- Curriculum
- Teacher development leading to better learning and standards.

Focus on individual pupils:

Resource has been targeted at individual pupils and groups of pupils.

The leadership team have been rigorous in raising standards of teaching and learning, including the introduction of triple impact marking, requiring pupils to rework their work to raise their knowledge and understanding.

Collaboration:

The trust continues to engage with other educational providers and experts to share delivery or good practice, and to drive up standards. This includes working closely with our sponsor; Bridgwater College, and with other academies within the same multi-academy trust. Links with other schools and academies in Somerset, such as Taunton Academy, remain strong.

New Initiatives:

As noted above, triple impact marking has been introduced, to show evidence of student progress. Literacy across the curriculum is being targeted with a clear action plan being drawn up.

Quantifying Improvements:

Detailed data is available showing the progress and attainment of pupils, exclusions, absences. Key data is shown above.

Financial governance and oversight:

As accounting officer I have responsibility for reviewing the effectiveness of the system of internal control. During the year in question the review has been informed by:

- Somerset County Council taking on additional internal control audits, performing the work of the responsible officer;
- The work of the external auditor, Bishop Fleming.

The responsible officer has made reports to the Finance and General Purposes Committees in each of the academies and to the Audit Committee of the Trust.

I have been advised of the implications of the result of their review of the system of internal control by the FGP & P and Audit committees and a plan to address weaknesses and ensure continuous improvement of the system is in place.

The academy trust's system of internal financial control is based on a framework of regular management information and administrative procedures including the segregation of duties and a system of delegation and accountability. In particular it includes:

- comprehensive budgeting and monitoring systems with an annual budget and periodic financial reports which are reviewed and agreed by the board of trustees;
- regular reviews by the finance, personnel and general purposes committee of reports which indicate financial performance against the forecasts and of major purchase plans, capital works and expenditure programmes;
- setting targets to measure financial and other performance;
- clearly defined purchasing (asset purchase or capital investment) guidelines;
- delegation of authority and segregation of duties;
- identification and management of risks, including the maintenance and updating of a detailed risk register.

Better purchasing:

All contracts are appraised or renegotiated in a timely manner to get the best mix of quality and effectiveness. For example, we have tendered for utilities contracts and have aligned contract lengths from the predecessor schools so that they all terminate on the same date, this will allow

us to tender for a larger contract in the future and therefore secure better value for money. Where possible this has been performed across the Trust where there are economies of scale.

External tendering was completed for audit services for the Trust, a new catering contract and wifi/ internet contract in Brymore, flat roof project and science refurbishment in BCA. In each case the winning bid the best value for money overall retaining the quality of the service provided. For example the use of the tender for the external audit and accounts preparation resulted in trust wide saving of £18,000.

Benchmarking:

Costs have been benchmarked across the Trust. The Trust regularly takes the opportunity to identify areas for making savings. An example is in the provision of legal services, which had previously been supplied to each academy separately. A Trust wide retainer and lower per hour charge has been secured for the Trust.

Options appraisal: The Trustees, Local Governing Body Members and Academy Leadership Teams apply the principles of best value when making decisions about:

- The allocation of resources to best promote the aims and values of the relevant academy.
- The targeting of resources to best improve standards and the quality of provision.
- The use of resources to best support the various educational needs of all pupils.

The trust has developed procedures for assessing need, and obtaining goods and services which provide “best value” in terms of suitability, efficiency, time, and cost. Measures in place include:

- Competitive tendering procedures
- Procedures for accepting “best value” quotes, which are not necessarily the cheapest (e.g. suitability for purpose and quality of workmanship)
- Procedures which minimise office time by the purchase of goods or services under £1000 direct from known, reliable suppliers (e.g. stationery, small equipment).

Economies of scale:

The trust regularly takes opportunities to work collaboratively with others to reduce and share administration and procurement costs. A contract was signed with Bridgwater College for the provision of:

- the examinations officer (BCA)
- careers advice and guidance (BCA)
- catering management (Brymore)

These services are provided at cost.

Maximising income generation:

Across the Trust opportunities are taken to maximize income generation without compromising the aims and operation of the academies. Thus Hamp lets out its hall to the local community in the evenings, BCA rents out its new 3G pitch and refurbished sports hall to local community groups and Brymore lets out the school during the holidays to church groups and forest school.

Reviewing controls and managing risks:

The Trust has an active Audit Committee who have managed and controlled risks throughout the year. Bishop Fleming have been appointed as external auditors as they have an excellent

reputation and experience with academies, including Multi-Academy Trusts. In the year the role of Responsible Officer and the Responsible Officer checks were purchased in from Somerset and issues raised have been reviewed and implemented.

Budget holders, management and Local Governing Body Members receive regular budget reports which are scrutinised to ensure the most effective use of resources to meet the objectives of the Trust.

The Academy Leadership Teams have moved balances to a high interest charity account to ensure maximum returns on surplus balances.

Insurance levels are reviewed annually and used cost-effectively to manage risks.

The Trustees review the reserve levels of the Academy annually. This review encompasses the nature of income and expenditure streams, the need to match income with commitments and the nature of reserves.

The Trustees have determined that an appropriate level of free reserves should be maintained. The reason for this is to provide sufficient working capital to cover delays between spending and receipt of grants and to provide a cushion to deal with unexpected emergencies such as urgent maintenance and to plan for future capital projects.

Lessons Learned

Cash flow forecasts were too conservative in the year 2013/14, so more investments could have been put on higher deposit. The Investment Policy has been extended to Hamp and Brymore in 2014/15 and where cash flow allows, higher interest deposits will be made.

Name: Peter Elliott

Academy Trust Accounting Officer

Date: 8 December 2014