

Stakeholder Annual Report

January 2024



Academies Trust

Introduction

from Chair of the Trust Board, Russell Gill



On behalf of the Board of the Co-op Academies Trust, it is a pleasure to introduce this summary of our performance over the past academic year.

In 2023, a key focus for the Board was the development of the next phase of our Strategic Plan. The over-riding theme of that plan was for CAT to continue to develop and mature into one of the leading multi-academy trusts in the North of England, with a particular emphasis on engendering a sense of belonging to our Trust - by our schools, our colleagues, our students and wider stakeholders from the communities we serve.

I am pleased to say that, over the past year, we have seen some important steps in this direction. We have continued to develop a strong school improvement offer and have seen academies support one another, share talent and provide opportunities for career enhancement for our talented colleagues. We have updated our approach to managing the Trust's finances, with a new reserves policy which balances the importance of academies controlling their own finances with the need to ensure that excess reserves are deployed where they can have greatest impact. We have promoted Trust-wide initiatives, such as our commitment to anti-racism and have continued to build on existing strengths like our approach to careers education and mental well-being.

We have reshaped the way our academies engage with and support the community, with a dedicated team operating in five geographical clusters connecting into individual academies. This team is also well-placed to link in with the Co-op's membership and community activity, helping bring to life co-operative values and principles at a local level. It's also been great to see the development of Trust-wide enrichment activities, with a plethora of sporting and cultural events and competitions between Co-op Academies. All of these initiatives - and more besides - show the value of belonging to a Trust like ours.

Our CEO's report below provides further details on these and other key developments within the Trust over the last twelve months.

In 2022, I reported that we intended to overhaul the composition of our Trust Board, bringing in new talent with a fresh perspective. Mags Bradbury and Jane Cowell served on our Board from the beginning of our Trust in its current form in 2014 and both made an enormous difference to the development of CAT - and Mags' contribution goes right back to the Co-op's first tentative steps with academies, 16 years ago. More latterly, Dave Robertson and Patsy Kane added considerable heft to a strong board of trustees, all of whom were focused on developing a Trust which married the drive for school improvement with a clear view of the co-operative values. Thank you to them all.

During 2023, we welcomed six new trustees to our Board - Gill Gardner and Claire Costello from the Co-op, Sarah Barton and Sarah Findlay-Cobb who are experienced MAT CEOs, Mo Ahmed who is Deputy Director from the Education and Skills Funding Agency (ESFA) and Ruth Welford, an Assistant Director from the Co-op's charity partner, Barnardo's. Together they bring great expertise in school improvement across all phases, special educational needs, safeguarding, finance, procurement, human resources and much more besides.

Finally, I'd like to express our appreciation to the Co-op, our sponsor, for making this Trust truly unique in the sector, and to Chris Tomlinson and his team of nearly 3000 colleagues, who make a difference to our academies every day. The final word should go to our wonderful students who help make all that we do worthwhile.

Russell Gill | Chair - Co-op Academies Trust

Report

from the Chief Executive Officer,
Dr Chris Tomlinson



Dear Governors

We're looking forward to a very successful 2024 for the Trust as we build on progress made in previous years. A massive thank you for your commitment and dedication and for the expertise you contribute, for your pupils, staff and communities. It is very much appreciated and makes a real difference to young people's lives. Thank you for your contribution.

Just over four years ago, when I came to the Trust, one of the first things I did was to ensure that we became a member of Confederation of Schools Trusts (CST) - an organisation where Trusts from all over the country network together cooperatively sharing knowledge and best practice. Led by Leora Cruddas, it is a highly successful organisation and one that was invaluable during Covid and continues to be a non-political pillar of support for all Trusts that belong to it. Working with other Trusts, as a co-operative organisation ourselves, is very important, as the sector works together rather than in competition.

In April 2023 CST completed some research work on "What is a strong Trust?", which in the end was documented and published as guidance for building strong trusts which outlines seven major domains of a Trust. The Department for Education (DfE), at the same time, published its guidance which was very similar, concentrating on six areas of a Trust. I shall use the CST model to review the year and, at the end of each section, summarise the key areas we must further concentrate on to become that strong and resilient organisation we aspire to be, as our schools develop to being "anchor institutions" of their communities.

At the CST conference last year it was very interesting to listen to Amanda Speilman's review of education nationally from her perspective as Ofsted's lead inspector just before she came to the end of her tenure. She was very clear that the national issue of pupil and staff attendance, with vulnerable students being most affected by the Covid pandemic, is still very evident, from early years right through to post-16. What we are trying to do in tackling this key issue is to ensure we understand the new, complex issues involved addressing this with strategic implementation of actions measuring for impact.

1. Strategic Governance

The governance of the Trust continues to be in a good, strong position; that is from the Trust Board through to our Academy Governing Councils. We have a sensible, clear and logical structure of governance throughout the Trust supported by an outstanding Governance team. The organisational aspects of our governance now are very strong and are admired by many Trusts around the country. In terms of internal and external audits centred on governance, of which we have had a number, we always achieve very positive reports and this is something we shouldn't take for granted but celebrate more. Now as a large Trust this has helped and supported us to continue to grow as we currently have thirty three academies, soon to be thirty seven by the end of the school year 23/24. We are very fortunate to have many good quality Trustees and Governors who challenge and support the Trust and its leaders, and show dedication to the role, which makes a real difference.

About three years ago we completed a review of the scheme of delegation; this was the first time ever the Trust had done this. It gave improved clarity and more focus to the role of the Governor. This has really helped with Ofsted inspections since the change was made. This activity needs to happen every three or four years and we have launched a second review with a greater focus on Governors and their role within their communities they serve. Co-op Academies Trust are proud to be part of Co-op's community strategy so we see this direction of travel as the perfect alignment for our Governor roles. With our new Community Strategic Plan supported by our new community staff structure offering extra expertise and capacity this is the perfect time to complete the review with that focus in mind.

2. Expert and Ethical Leadership

Within the Trust we currently have the best set of Regional Directors, Senior Leaders, Executive Headteachers and Headteachers we have ever had. Leadership is in a good position especially in terms of ethical leadership. The 'Personal Development' category, graded by Ofsted, is always our strongest grade, and the Co-op values that mirror the Nolan Principles of Public Life really are very evident in all tiers of leadership in the Trust. At the same time, in 20 Ofsted inspections over the last 16 months, Leadership has always come out very well and for the vast majority is GOOD, including Safeguarding being effective in every one of our schools, with often the feedback being glowing in this area. Leadership and the development of Safeguarding throughout the Trust has greatly improved in the last two years from a position of vulnerability to now a strength of the Trust, which is no mean feat with the impact of Covid still very evident. A special mention to Co-op Academy Oakwood that achieved only the second outstanding judgement within the Trust and this was for Personal Development. I believe many of our other schools would have received outstanding graded categories, but they were inspected under the part of the Ofsted framework which doesn't allow a change of grade.

We are a single organisation - an education charity - and the collaboration and cooperation between our schools regionally in local groups and across the Trust is stronger than ever. We have 36 networks sharing best practice across the Trust, and many more events where leaders network, including support staff. On top of this, of course, we have lots of informal networks that aren't led from the central or regional offices, where our workforce share ideas, jointly solve problems, and support and challenge each other. The Trust, as a single unit in terms of identity, is improving as we develop this culture in every possible way; this is always underpinned by our Co-op values, which generate a sense of belonging and common belief for the organisation.

(continued)

We continue to develop our succession planning model for every tier of leadership within the Trust, expanding our training and development offer to ensure we seek internal solutions first, becoming a true “greenhouse Trust”. This has included, for example, more coaching across the Trust, as well as developing ‘Diverse Educators’ training, so we continue to be a better representation of our communities at every level and create more development opportunities for our next generation of Headteachers.

In terms of expert leadership, this year saw a good improvement in our primary data results with nearly 70% positive progress scores at key stage two for 17 schools and 51 progress measures in total. Year 1 phonics was the best it has ever been, nearly reaching 90% which was a fabulous achievement, but there was a step sideways for our secondary and post-16 results. There were some exceptions: Co-op Academy North Manchester really did buck the national trend and delivered their best ever set of results, to deliver positive progress 8 for the first time. However secondary outcomes and post-16 need to improve this year as we work towards our goal of seven out of ten schools having positive progress 8 scores in 2024. We have been very fortunate to be awarded £1 million by Mathematics Excellence Fund over the next three years to rollout a Mathematics programme for High Attaining Pupil Premium students, and this project will make a massive difference in this area supporting all our secondary and post-16 schools/colleges. With further Trust Capacity Fund (TCaF) funding from the DfE being awarded to us, we can expand our SEN improvement team to really help and support in this area.

3. High Quality Inclusive Education

All of our schools will work towards the anti-racist accreditation quality mark over the next two years, in partnership with Leeds Beckett University, developing their inclusive curriculum and the ethos of their schools. The Trust’s curriculum statement gives the overriding values and vision for our curriculum with inclusion at the very core of all what we do. Our new ITT (initial teacher training) course led by Andy Gibson and supported by Claire Norcott, recruited forty trainee teachers for this year, which will help with recruitment for September 2024 and, at the same time, will help to ensure we are more diverse and have a more representative workforce.

Our SEN results in 2023 did improve from the previous year, which is positive, but we still have a long way to go to ensure all our students, including the most vulnerable, have successful pupil experiences in school. We take a great deal of pride in serving many deprived communities, in our Trust, but we must really start to reverse the national trend and reduce the Pupil Premium gap. Both the areas of SEN and Pupil Premium, more than ever, have a very high profile and importance in the Trust, impacted by strategic implementation of sensible actions to ensure our most vulnerable students have improved education experiences. We must give time for those actions to have impact and become embedded so we can achieve this vital objective.

4. School Improvement at Scale

Over the last four years this area has grown the most, following the development of our highly successful Director team, which has been tremendous in supporting and achieving our strong Ofsted performance in the last sixteen months. The team, now comprising more than twenty colleagues, has made a real difference to the quality of curriculum and outcomes in all our schools. The Directors have been supported by our Specialist Leaders of Education (SLEs) who represent excellent school to school work within regions and across the Trust. All of this, of course, needs to be undertaken on an informed basis, and our data collection and analysis has rapidly developed and improved to ensure support and challenge is directed, targeted and purposeful. Of the many aspects of improvement in this area I have mentioned just three, which all have shown rapid impact and development. However this is still the area as a Trust we need to concentrate on and continue to work on to ensure all our schools are at least GOOD with strong outcomes for all our pupils in terms of admission numbers, public outcomes, low exclusion figures and pupil attendance for all, to name a few.

The pupil numbers at Co-op Academies Belle Vue, Stoke, Southfield, and at Connell Co-op College have increased exponentially; this, alongside previous pupil growth in our other secondaries in past years, shows real confidence from the local communities they serve. This is a good sign and one we are happy with, as long as we can maintain the quality of education for all our students.

One area where it is essential we have shown a real focus is that of staff and student absence. We track data meticulously in both areas, as we try to support our schools in ensuring pupils start to attend school more often, aiming to return to pre-Covid levels, bucking the national trend. Our Director of Attendance and Behaviour, Pippa Sadgrove, has been working very hard with staff in our schools to make sure we fully understand the range of complex issues about why pupils aren’t attending school so often, so we can try and support them to address the causes. On top of this work we are also

working with the Education Endowment Foundation (EEF) supporting research in this area, with schools focusing on research projects to improve family and parental engagement. We also are working in partnership with Barnardo’s (Co-op’s chosen charity this year), rolling out the attendance mentor programme they piloted last year in the north-east. One of the key issues nationally is the lack of services available to support families, and through this mentoring programme we are hoping this will support this area. Our new community programme and the support we are offering will also, we hope, improve parental relationships and engagement supporting our most vulnerable students to attend school more.

One area over the last year I am particularly pleased with is the Trust-wide opportunities we now offer all our schools from regional sporting competitions and cultural events, to Trust-wide spelling bee, Mathematics competitions, debating, poetry, Envision and career-focused activities. It is an excellent offer and again aims to give the best pupil experiences to improve attendance across our schools. Our schools then follow this Trust-wide example by developing more pupil experiences within their own schools to help with attendance. A good example of this is chess at Co-op Academies Belle Vue and Stoke, where the student enthusiasm for this excellent game is thriving. It is great to watch these activities and amongst the highlights of the year were the performance of ‘Les Miserables’ by all the schools in Greater Manchester, SEN Panathlon War of the Roses event and the Co-op cross country activities.

As a Trust we need to remain focused on tackling the pupil attendance national issue and sharing best practices across the Trust to ensure our data keeps improving, especially for those children who are most vulnerable.

5. Workforce Resilience & Wellbeing

As a Trust we are only as good as our workforce, and we are fortunate to have a very dedicated and committed staff team of nearly 3000, working hard to serve their communities. More than ever this year we have tried to recognise this dedication with more rewards, prizes, and gifts to say thank you to support staff and teachers. We have never given out so much thanks including within our communication channels, which is richly deserved. At the same time we have many networks, almost too much CPD and a huge range of internal opportunities available to all our staff: both teachers and support staff. Lots of our schools now have wellbeing groups, including a cross-Trust Headteacher wellbeing group, that make recommendations which are agreed and acted upon. This year, following the external staff Edurio survey, every secondary school which was rated below a certain result received an external behaviour audit, to improve school practices in this area. For the first time staff could really see the Trust-wide actions in response to the survey.

We complete exit interviews at every level within our Trust and look to learn from this feedback. We know taking pay increases away from performance management and concentrating this on professional development has had a positive impact on our workforce, with more teaching staff crossing the threshold into the upper payment range, but also helping to reduce unnecessary workload. Mental health for staff and students continues to have the highest of profiles as we continue to train and improve the cultures within our Trust to ensure our schools are great places to work. Recruitment is challenging at present but this year we have forty new trainee teachers for Primary, SEN and Secondary/Post-16 to help tackle this issue. Our succession planning at every level and communication of vacancies across the Trust help with recruitment, but recruitment and retention of good quality staff is vital and something we must continue to concentrate on. Our focus on staff wellbeing and attendance is one aspect of this and something we need to continue to focus on.

6. Finance and Operations

Out of eight schools that aren't rated GOOD currently, the vast majority has been due to a lack of resources, despite the best financial management within that school. The stories of Co-op Academies Swinton and Parkland are two such schools that are real examples of this. The Co-op values of equality and equity really for me are crucial here, so the amendments to the reserves policy have been vital to enable us to redistribute some of the resources to our most vulnerable schools to help. At the same time we were becoming very reserves rich with outcomes not at levels we would hope and, as an educational charitable Trust, for me that is also not ethically right. Now we have a sensible approach to reserves, and external organisations can see and hear that, we are also benefiting from bids we are making to Mission 44, Mathematics Excellence Fund and the DfE attracting extra revenue into our Trust to benefit staff and students.

This year has seen some changes in systems with the main project implementation of the Arbor system replacing SIMS Management Information System. This transition went very well and already schools are seeing the benefits including financial ones as we seek good economies of scale. We have had £2.5 million investment into our IT infrastructure through the DfE 'Connect the Classroom' scheme, which we were again selected to receive; our websites now are so much improved and easier to work with and, associated with our new reserves policy, we have brought in the new Inter Curriculum Financial Planning (ICFP) programme that will help decision-making regarding where and when we spend money to improve our schools, in the end making sure we obtain the best value of money at the same time as reducing the number of financial systems our schools are using. We now need to improve our payroll and HR systems in the Trust and make sure our IT central service keeps improving, becoming even more resilient to CyberCrime and providing an IT service that is even more reliable.

7. Public Benefit and Civic Duty

As a Trust this year we have received support from other Trusts and also supported other Trusts where we could. We work well with partners internal and external to education and pride ourselves on being a co-operative Trust.

Our new community programme is very exciting and supported brilliantly by the Co-op in so many ways, through resources, capacity, networks and knowledge. The new programme, led by Ruth Agnew and Liz Garrity, has really made a positive start and we are delighted with the impact already. Being supported by Nisa and the Co-op to award everyone of our students a Christmas present this year was an incredible gesture, to award every one of our schools a small grant to deliver their community support programmes (e.g Community Fridge) due to the grant from the Co-op is brilliant and lastly, now, to have a Community team staff structure in place that has the capacity to support the communities locally with our schools becoming the Co-op anchor institutions we want them to become has already made good progress. Thank you to the Co-op for the help given so we can achieve this within the areas we serve. All of this has been achieved without the need to increase the top slice: tremendous support.

Thanks again for all you do for the Trust and here's to 2024, and us working together to continue to make very good progress.

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Dr Chris Tomlinson | CEO - Co-op Academies Trust



Our Trust Board

Although we refer to our board members as 'Trustees' they are also, in legal terms 'Directors'. The Department for Education also considers them to be the 'Governors' of the Trust.

You may come across any or all of these terms used to describe Board members. This reflects the legal structure of the Trust as both a company limited by guarantee (i.e. without shareholders), and an exempt charity (i.e. accountable to the Secretary of State for Education, rather than to the Charities Commission).

Our trustees are charged with the three core functions of governance, which the Department for Education summarises as:

- Ensuring clarity of vision, ethos and strategic direction;
- Holding executive leaders (the Chief Executive Officer and senior leadership team) to account for the educational performance of the organisation and its pupils, and the effective and efficient performance management of staff; and
- Overseeing the financial performance of the organisation and making sure its money is well spent.

In addition, each of our 33 academies also has an Academy Governing Council (AGC). The Trust Board delegates responsibilities to the AGCs via the Trust Scheme of Delegation, which is published on the Trust website.



We currently have 9 trustees and are in the process of recruiting a tenth:



Mo Ahmed



Sarah Baker



Claire Costello
Chair of People and Remuneration



Tim Cutting
Chair of Finance and Resources



Sarah Findlay-Cobb



Gill Gardner
Chair of Audit and Risk



Russell Gill
Chair of Trust Board



Arati Patel-Mistry



Ruth Welford

The Work of the Trust Board Committees

During 2023 we restructured our Trust Board committees. This was partly a reflection of the fact that we have been inducting a number of new trustees; that being the case we felt it important for some items of business previously discussed at Committee level to have full Board visibility as new trustees become familiar with the Trust and its work.

This involved pausing some committees while expanding the work of others and the current committee structure comprises three committees: Finance and Resources, Audit and Risk and People and Remuneration.

The Finance and Resources Committee

Chair: Tim Cutting

Members:

Mo Ahmed
Russell Gill
Ruth Welford

Clerk: Sarah Lay

The Finance and Resources Committee meets five times each year. As well as continuing the work of the former Finance Committee around monitoring the Trust's management accounts, supporting financial planning and ensuring value for money, the Committee has had added to its remit, oversight of the Trust's physical resources and capital projects and any issues relating to Private Finance Initiatives (PFI) contracts. While maintaining a close link to the Audit and Risk Committee (ARC) the Finance and Resources Committee now has a separate remit and membership and only meets jointly with the ARC once a year to scrutinise the annual report and accounts and discuss them with the external auditor.

Key issues recently discussed include:

- Changes to the Trust's reserves policy and the monitoring of its implementation
- The findings of the external auditors and the annual report and accounts
- The introduction of integrated curriculum and financial planning (ICFP)
- Ensuring planned spending avoids the inappropriate build up of excessive reserves
- Regular monitoring of the monthly management accounts
- Oversight of business planning assumptions and business plans

The Audit and Risk Committee

Chair: Gill Gardner

Members:

Tim Cutting
Russell Gill
Arati Patel-Mistry

Clerk: Sarah Lay

Gill Gardner took over as Chair of the Audit and Risk Committee in September 2023 after Dave Robertson stepped down from the Board. The committee meets five times a year and its role is to advise on the effectiveness of strategic processes for risk management, internal control, governance and information assurance. It takes the lead on liaison with the internal and external auditors in agreeing their plans and following up on the results of their work, and, working with the Finance and Resources Committee, oversees the production of the Trust's annual report and accounts.

Key issues recently discussed include:

- Changes to the internal audit provider
- Oversight of the previous year's internal audits (and follow up) and planning for the current year (listed below for information)
- Scrutiny of the annual report and accounts
- Oversight of the central risk register and the Trust's key areas of risk
- Review of risk management policy and practice

Internal audits already completed or planned during the current financial year are:

- Safeguarding
- Data protection
- Asset management
- Payroll and pensions
- Private Finance Initiatives (PFI)
- Human Resources
- Anti-fraud arrangements
- IT cyber security

The People and Resources Committee

Chair: Claire Costello

Members:

Sarah Findlay-Cobb
Russell Gill
John Hill (non-trustee co-opted member from Co-op Rewards Team)
Ruth Welford

Clerk: Ruth Agnew

This Committee has grown out of the former Remuneration Committee and Claire Costello took over as chair in September 2023. As well

as the issues directly related to pay, which were covered by the previous committee, the Committee now has oversight of all of the Trust's staffing policies, the People Strategy and all related data. The Committee has only met once so far in its new form, but will meet four times a year going forward. Issues discussed at the first meeting include:

- Gender and ethnicity pay gap reporting
- The real living wage
- Executive leader pay strategies
- The teachers' pay policy

Our Members

The National Governance Association (NGA) says that the Members of a Trust are “the guardians of the governance of the trust.” In a company limited by guarantee, in other words a not-for-profit company like an academy trust, Members take the place of shareholders. Their responsibilities are limited but very important.

The Members fulfil their responsibilities by appointing the Trustees, and monitoring how the Trust Board operates. As a sponsored Trust our members are appointed by the Co-op Group and they are all Co-op employees; in addition the Co-op Group itself is a corporate Member of the Trust.

The Members meet twice a year, and can make decisions between meetings by way of written resolutions. The details of how Members’ meetings and decision-making processes are conducted is determined by the Companies Act 2006 and by the Trust’s Articles of Association, which are published on the Trust’s website.



Rebecca Birkbeck



Paul Gerrard



Gill Gardner



Russell Gill



Dominic Kendal-Ward
(on behalf of the Co-op Group)



We're Growing

32
Academies
in September
2023
up from 29 at the
end of 2022

19,501
Students
up from 18,663
in 2022

2916
Colleagues
up from 2869
in 2022

83
Co-op
Governors
up from 80 in 2022

£202.6m
income
up from £150.5
in 2022*

*see full breakdown on next page

Trust Financial Summary as at end financial year August 31 2023)

Financial Summary	Current Year	Prior Year	
	£000	£000	
Operating income	164,763	141,878	
Transfers / Conversions	37,831	8,602	*includes transfer of new building at Co-op Academy Belle Vue for £31.8m
Operating Costs	(169,207)	(153,486)	
Revaluation of Pensions	3,613	83,252	
Net Movement in Reserves	37,000	80,246	
Cumulative Reserves	317,490	280,490	
Tangible Fixed Assets	362,531	324,316	
Net Current Assets	10,064	19,241	
Liabilities >1yr	(55,105)	(63,067)	
Net Assets	317,490	280,490	
Trust Reserves	317,490	280,490	

The summary financial statements take into account the technical reporting requirements of both Accounting Standards and the Regulator (through the Academy Trust Handbook). We are required to show movement in the annual liability through our Statement of Financial Activities (SOFA). From an operating perspective, the Trust made a revenue deficit of £3m during the year, plus £36.5m of capital receipts which include incoming transfers of assets and funding for capital projects during the current academic year.

Do
what
matters
most

Be
yourself,
always

Show
you care

Succeed
together



Academies Trust

Co-op Academies Trust
1 Angel Square, Manchester, M60 0AG

coopacademies.co.uk