 **Axia Learning Alliance**

 Including:

Lostock Hall Community Primary School

Penwortham Broad Oak Primary School

Tarleton Community Primary School

With Partner schools

Bamber Bridge St Aidan’s CE Primary School

New Longton All Saints’ CE Primary School

 **Public Consultation**

 **Booklet One**

**Longton Primary School**

**Proposal to Change to Foundation School Category and Join a Charitable Trust – A Rationale**

**The reason for the consultation**

The Governing Body of Longton Primary School is proposing to change their legal school category from community school to foundation school and at the same time join the Axia Learning Alliance. This differs from the structure of an academy, it is not a multi-academy trust, it is a way of working more collaboratively with a group of schools while maintaining the positive relationship with the local authority.

**What we would like you to do next**

We would like to know what you think of our proposal so we invite you to take part in our public consultation. You can do this by:

1. Reading this document entitled Booklet One *Changing to Foundation School Category and Acquiring a Charitable Trust – A Rationale*, which provides an overview of the issues faced by the schools, the proposal being put forward, the implications of these proposals, details of the timeline for consultation and what happens next. You may also want to read Booklet Two *Questions and Answers*, which provides a series of commonly asked questions together with answers, which have been collated from the Department of Education (DfE) sources.
2. Attending one of the virtual consultation meetings (see inside for details);
3. Completing the Questionnaire Response E-Form.

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**1. Executive Summary**

1.1 The Governing Body of Longton Primary School is proposing a change of school category from community school to foundation school and simultaneously joining Axia Learning Alliance. The proposed date of implementation is 6 November 2023. The Alliance will be a mutual Co-operative Membership Trust. The alliance is not an academy.

1.2 The school, supported by the Alliance, will work to improve the existing high standards of attainment and services for pupils and their families in the local community.

1.3 As a Foundation school, **we will still be part of the local authority family of schools**, have the opportunity to be supported by a Charitable Trust set up to help the drive for improved standards in schools, in particular, through engaging with the wider community. The Governing Body of the school is proposing to join a Trust, a long-term alliance that brings together the co-operative movement and existing strong links with the local community. Other educational partners may also support the work of the Alliance.

1.4 The Governing Body of the school will gain new powers and responsibilities. They will become the employer of all staff, although existing pay and condition arrangements will be unchanged as the school will remain in the maintained sector and be subject to national pay and condition agreements. The Governing Body will also become responsible for pupil admissions, but will work jointly with the Local Authority to administer the provision of pupil places within the requirements of the National Schools Admissions Code. The Alliance will hold the land and capital assets in trust for the school and the Governing Body will retain day-to-day responsibility for managing these assets.

1.5 The full consultation documentation is contained in two booklets:

**Booklet One** *Changing to Foundation School Category and Acquiring a Charitable Trust – A Rationale* is the document you are now reading and provides an overview of the issues faced by the school, the proposal being put forward, the implications of these proposals, and details of the timeline for consultation and what happens next.

**Booklet Two** *Questions and Answers* provides a series of commonly asked questions together with answers and can be obtained from the school or from the school’s website.

1.6 Stakeholders have the opportunity to comment on these proposals during the consultation period, which runs from **Noon Friday 15 September 2023 to Noon 13 October 2023.**

1.7 The Governing Body will consider the outcome of the consultation and then decide on whether to change category and join the charitable trust or to remain a community school.

1.8 We have tried to put forward the proposals in a clear manner and there are opportunities to attend meetings and ask questions about the proposals. We are open to alternative suggestions and nothing in this consultation documentation or process pre-determines the outcome of the consultation.

1.9 In order to make the change the Governing Body is legally proposing to change category from being Community School to become Foundation School, and at the same time, formally join Axia Learning Alliance.

**2. Vision and Values (Axia Learning Alliance)**

2.1 Vision: is of a strong family of inspiring schools that serve our local community and contribute fully to the provision of education in the area and collaborate with other partners to achieve common goals.

 ***‘Collaboration, Innovation, Community’***

To achieve our vision, we will:

* Continue to develop our child focused, high quality teaching
* Provide a relevant and exciting curriculum
* Teach our pupils to be good citizens
* Develop lifelong learners
* Ensure we meet the need of our individual communities

Values: Axia Learning Alliance is founded on the values of:

* Being none competitive or judgmental
* Being outward facing and forward thinking
* Having a commitment to being fully inclusive
* Being collaborative
* Ensuring we work in an ethical way
* Respecting our autonomy
* Sharing our resources

For our church schools this isalsoembedded in the Christian faith.

We are a group of schools that celebrate our individual character. Our schools may have different systems, pedagogies and cultures, but we understand the need to focus on learning and the impact of teaching to improve outcomes for children and young people in our schools. Together we will endeavor to ensure that the children and young people in our schools receive a rich variety of learning. This commitment to developing a high-quality curriculum, delivered by well trained, effective teaching and support staff, and the sharing of expertise is at the heart of our vision.

2.2 As a Co-operative Trust, the Alliance has adopted the values and principles of the co-operative

movement. (See Appendix A).

2.3 Co-operatives are based on the values of self-help, self-responsibility, democracy equality, equity and

solidarity. In the tradition of their founders, co-operative members believe in their ethical values of

honesty, openness, social responsibility, and caring for others.

2.4 Co-operatives principles are: voluntary and open membership; democratic member control; member

economic participation; autonomy and independence; education, training and information;

co-operation among co-operatives; concern for community:

2.5 These values and principles underpin the work of the Alliance and we believe contribute to

strengthening the schools and its links with the local community.

**3. What are the key aims of the Alliance?**

3.1 **The Alliance’s particular focus**

The overarching aims of the Axia Learning Alliance are:

* Ensure the best outcomes for our children in all schools;
* Ensure value for money, developing best practice across the trust for procurement;
* Provide high quality and relevant professional development on evidence-based research
* Provide opportunities which support the development of children’s character and allows them to become good citizens.

The alliance is built on the premise of collaborative, executive leadership with all schools an equal partner.

3.2 **What each Partner brings to the Trust?**

* **Alliance Founding Schools.** The Foundation schools of Lostock Hall Community Primary School, Penwortham Broad Oak Primary School and Tarleton Community Primary School serve communities in South Rabble and West Lancashire. Between them they have a wealth of experience and expertise in the provision of education across a range of contexts. Each school is innovative in its approach to providing a high-class education for its children whilst valuing its community and the lessons of the past. In addition, each school’s governing body brings a wide range of skills and experience which is of benefit to the Alliance as a whole. The Governing Bodies of Lostock Hall Community Primary School, Penwortham Broad Oak Primary School and Tarleton Community Primary School are represented on the Trust Board with two nominated trustees, being the Headteacher and Chair of Governors (or nominee). Longton Primary School will be similarly represented.
* **Founding Partner Church Schools**. Church schools already have a legal foundation with the Diocese but this does not exclude them from being partners in the Alliance. The inclusion of New Longton All Saints’ CE Primary School and Bamber Bridge St Aidan’s CE Primary brings experienced teams and high performing schools with different settings and context, affording all children across the five schools a broad range of opportunities to work collaboratively. As existing Foundation schools, our governing boards are already experienced and are able to support across the alliance as required. As Founding Partner Schools both schools will be represented by the Headteacher and Chair of Governors (or nominee) on the Board.
* Collectively, the five schools that currently make up Axia Learning Alliance share the same vision, values and ethos of working in partnership to grow together and ensure the children in each school receive the very best whilst maintaining each school’s unique character. By working collaboratively schools are stronger.
* **The Co-operative Movement**— has extensive experience in supporting educational establishments to develop and embed a co-operative ‘values driven ethos’ across the school and across the curriculum. It will also help bring a global dimension to school and community perceptions, through national and international links with other co-operative educational institutions and organisations. Each Partner organisation will be represented on the Trust board by one nominated trustee.

 3.3 **How will joining the Alliance make a difference?**

* The Axia Learning Alliance is a ‘Community Development and Co-operative Model’. The founding schools of the Alliance decided to acquire this model as it enables those who are directly involved in the schools, parents/carers, staff and learners, to become engaged in its long-term strategic direction through membership of the Alliance. This has particular relevance in our local community where traditional values and support are highly valued.
* It also allows those more directly involved such as other members of learners’ families, to become involved. We believe that engaging members alongside the organisational partners detailed, is essential as we work towards our vision of transforming educational opportunities for all in the community we serve.
* All the schools involved are ambitious, and wish to further accelerate the pace of improvement, and want to form social partnerships with organisations with values akin to their own, with appropriate expertise to engage learners and our communities more actively in social change. We would want this to help us value and reward achievement in a wider range of formal and informal settings.

3.4 **How the Partnership may develop**

When the Alliance was formed back in 2021 it was envisage that the Alliance may expand with other schools wanting to join together with other partners. The Alliance Board are supportive of Longton Primary School joining the Trust.

Alongside this the Alliance is also developing partnerships to provide support in other areas. These organisations may work through membership of the Alliance or develop into formal Partners.

## 4. How the Alliance Works?

4.1 The Alliance (Trust) is a charitable company meeting the legal and other requirements of the Department for Education (DfE). It carries out its duties in relation to schools as set out by the DfE, specifically by appointing two governors to the Governing Body of each school and by holding the land mutually in trust for its school community.

4.2 The Alliance is regulated by the Secretary of State (as are all educational trusts and academies) and by the DfE and is registered as a company limited by guarantee with Companies House.

4.3 Trustees will not be able to derive an income from the Alliance, but the Alliance may become an employer as it develops its objectives in providing services and/or commissioning services. Any income generated by the Alliance must only be used to support its charitable aims. **The Alliance does not seek to alter the individual characteristics of the schools and it does not seek to change the character (religious or otherwise) of the schools.**

4.4 The Alliance meets a minimum of three times per year (co-ordinated with school governance as required).

4.5 The Alliance works with other people and organisations, as appropriate, in order to carry out its work. As the Alliance grows and develops its work, it may be appropriate to consider additional partners. There will be a process involving Trustees to ensure that any future partner will comply fully with the vision, values and aims of the Trust. Longton Primary School has already provided information to the Board.

4.6 The Alliance is made up of the schools, partners, and members as shown in Appendix B. If other schools join the Alliance, the number of Trustees for those schools will be dependent upon the agreed type of membership.

4.7 The Alliance will appoint a minority of governors at the school (see Appendix C).

4.8 The Alliance has an ethos of co-operation and democracy consistent with co-operative values. It seeks to empower learners and their community as well as helping our young people prepare for these challenges and their future as global citizens.

## 5. Foundation Category

5.1 To join the Alliance, the schools are required to change their current category and become a Foundation School. In acquiring Foundation Category, the Governing Body and not the Alliance, will assume new responsibilities, including responsibility for the employment of staff and the admission of learners to the schools. In addition, the Alliance will hold the land and assets in trust for all the schools involved. The Governing Body will retain day-to-day responsibility for managing the assets, as is the case in the present situation.

5.2 The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2007 provide for all the rights, powers, duties and liabilities to transfer existing staff from the Local Authority to the Governing Body.

5.3 Existing and new teaching staff will continue to work under the terms of the ‘School Teachers’ Pay and Conditions Document’ (STPCD). The School’s Governing Body will set out the terms and conditions for new support staff, which will be no less favourable than those applying to existing staff. All staff will, therefore, always enjoy as a minimum the same terms and conditions of employment as in any maintained state school.

5.4 The school will continue to teach the National Curriculum and will be inspected by Ofsted at appropriate times.

5.5 The Governing Body will continue to have day-to-day control of the school’s land and assets (which the Trust will hold ‘in trust’ for the school), as is the case at present.

5.6 We will work in collaboration with the Local Authority in ensuring strict adherence to the Schools’ Admissions Code whilst reserving the legal right to review admission arrangements if deemed appropriate.

## 6. What does this mean for Parents, Carers and Pupils?

6.1 **The school will remain part of the Local Authority’s family of schools.** We will continue to have a fair admissions policy and not introduce selection by ability. Parents will apply for places at Alliance schools as part of the Local Authority process. The school will continue to work with the Local Authority to ensure that pupil places are given fairly in line with the published admissions criteria, which conform, to the School Admissions Code. However, an Alliance school’s Governing Body has the right to review admissions arrangements as deemed appropriate.

6.2 The current situation of appointing Parent, Co-opted, Local Authority and Staff Governors will be maintained. However, the Governing Body would have a minority of governors appointed by the Alliance, probably the legal minimum of two. (See Appendix C).

All parents, carers and pupils currently attending an Alliance school may become full members of the Alliance (as may all learners, staff and members of a range of defined supporting community organisations). Our school will be part of a Stakeholder Forum with elected members including parents, staff, learners (including pupils) and community organisations. Its purpose will be to hold the Alliance to account, to help shape policies and to elect a minority of trustees.

The school’s ethos, including objectives relating to behaviour and performance and the school’s vision and values will be strengthened by working within the framework of co-operative values. It is envisaged that the Alliance arrangements will contribute significantly to a further improvement in the school’s performance and a better educational experience and outcome for every young person and their family.

## 7. What does this mean for Employees?

7.1 The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations

2007 provide for all rights, powers, duties and liabilities to transfer existing staff from the Local Authority to the Governing Body of the school. Employees will be employed by their school’s Governing Body instead of the Local Authority and we will continue to recognise the same unions. The existing rights of teachers will be fully protected if the school joins the Trust. We will still be bound by the School Teachers' Pay and Conditions Document.

7.2 The Governing Body will set terms and conditions for its own support staff. However, terms and conditions will be safeguarded as per the prescribed regulations for existing staff and they will maintain the same employment rights as Local Authority employees. Employees will still be represented on the Governing Body, as elected by their colleagues, as well as there being representatives from parents, the community and the Local Authority as is the case now, plus the additional foundation governors nominated by the Alliance.

## 8. The Consultation Process

8.1 Please let us know what you think about the proposal by one or more of the following ways:

1. Complete and return the Consultation Questionnaire.
2. Send in your comments to the school.
3. If you are a parent, carer, member of staff, or member of the public, come to the appropriate meeting to discuss the proposal.

Consultation meetings will be held as follows:

**Tuesday 19 September 2023**

3.45 pm Staff meeting

5.00 pm Parents/Carers

6.00 pm Open Meeting

8.2 You can comment at any time from **Noon Friday 15 September 2023 – Noon 13 October 2023**

After the consultation is closed all comments will be considered and a report will be prepared for the Governing Body. This report will be made available on the school’s website. Individual responses will not be published on the website but will be presented to the Governing Body and will be available for inspection by the public on request. The Governing Body will then meet to review the report and all the comments before reaching an informed decision.

* 1. The Governing Bodies may decide to:
1. Modify the proposal in the light of suggestions made during consultation and, if the changes are significant, consult on the changes.
2. Defer the proposals to another time.
3. Decide to remain as a community school without any changes.
4. Agree to the conversion

8.4 The proposed implementation date is **6 November 2023.**

8.5 Copies of all the consultation documents can be obtained from the school’s website or from the school.

8.6 If you have any queries about anything you have read here and would like further clarification, please contact the Headteacher l:

 **Longton Primary School** – School Lane, Longton, Preston, Lancashire, PR4 5YA

 Telephone: 01772 612495 Email: bursar@longton.lancs.sch.uk

## 9. List of Consultees

As part of the consultation process, the school is consulting with the following:

* Pupils currently at the school (through school council).
* Parents/carers of children currently at the school.
* Staff currently employed at the school, both teaching and support staff.
* All schools currently sending children to the school.
* The Local Authority and neighbouring Local Authorities.
* Local MPs and serving local Councilors’.
* The local Teacher Associations and Trade Unions representing our support staff.
* Other neighbouring schools which may be affected by the proposals.
* Local Community Groups including nurseries, child care providers, sports and leisure providers.
* Local and neighbouring Colleges and Higher Education Institutes.
* Local Diocese.
* Local Mosques.

A complete list will be published on the school’s website. If you feel that there are other stakeholders who should be consulted, please contact us.

## Appendix A: Statement on the Co-operative Identity

**Statement on the Co-operative Identity as approved at the ICA Congress, Manchester, September 1995**

**Definition**

A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly owned and democratically controlled enterprise.

**Values**

Co-operatives are based on the values of self-help, self-responsibility, democracy, equality, equity and solidarity. In the tradition of their founders, co-operative members believe in the ethical values of honesty, openness, social responsibility, and caring for others.

**Principles**

The co-operative principles are guidelines by which co-operatives put their values into practice.

**1st Principle: Voluntary and Open Membership**

Co-operatives are voluntary organisations, open to all persons able to use their services and willing to accept responsibilities of membership, without gender, social, racial, political, or religious discrimination.

**2nd Principle: Democratic Member Control**

Co-operatives are democratic organisations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary co-operatives members have equal voting rights (one member, one vote), and co-operatives at other levels are also organised in a democratic manner.

**3rd Principle: Member Economic Participation**

Members contribute equitably to, and -democratically control, the capital of their co-operative. At least part of that capital is usually the common property of the co-operative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any of the following purposes: developing their co-operative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transactions with the co-operative; and supporting other activities approved by the membership.

**4th Principle: Autonomy and Independence**

Co-operatives are autonomous, self-help organisations controlled by their members. If they enter into agreements with other organisations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their co-operative autonomy.

**5th Principle: Education, Training and Information**

Co-operatives provide education and training for their members, elected representatives, managers and employees so they can contribute effectively to the development of their co-operatives. They inform the general public - particularly young people and opinion leaders - about the nature and benefits of co-operation.

**6th Principle: Co-operation among Co-operatives**

Co-operatives serve their members most effectively and strengthen the Co-operative Movement by working together through local, national, regional and international structures.

**7th Principle: Concern for Community**

Co-operatives work for the sustainable development of their communities through policies approved by their members.

**Appendix B: Alliance Structure**

*Proposed Longton Primary School*

*2 Trustees*

Other Partners

Organisations

1 Trustee

Schools

2 Trustees

Lostock Hall Community School

2 trustees

Bamber Bridge St Aidan’s CE Primary School

2 trustees

Penwortham Broad Oak Primary School 2 trustees

New Longton All Saints’ CE Primary School

2 trustees

**Axia Learning Alliance**

Tarleton Community Primary School

2 trustees

Co-operative College

Representative

1 trustee

Stakeholder Forum Membership including Parents Staff Learners Community Organisations

Parents

Governing Bodies

Each GB will have 2 trust governors

|  |  |  |
| --- | --- | --- |
| **Member**  | **Trustees**  | **Proposed contribution to the Alliance** |
| **Founding Schools**Lostock Hall Community Primary, Penwortham Broad Oak Primary and Tarleton Community Primary Schools**Founding Partner schools** Bamber Bridge St Aidan’s CE Primary School New Longton All Saints’ CE Primary School  | 2 trustees  | * Improved outcomes for all children, every child expected to make progress at least in line with, and for many above, national expectations
* Every school will be well led, purposeful and governed
* All staff are motivated to self-improve and aspire to excellence
* All schools are to be judged good or better following Inspections
* Schools will be valued by their community
 |
| To work within the Alliance to help deliver on its vision to create an environment which will support the learning needs of the whole community, offering inclusivity, lifelong learning opportunities and improved children’s services through mutually agreed aims and values. |
| **The Co-operative movement**  | 1 trustee | Axia Learning Alliance would be part of the global co-operative family. It would become a member of the Schools Co-operative Society, the national network of co-operative trusts, and work with the Co-operative College to identify a suitable long-term co-operative partner for the Alliance. The Co-operative College has extensive experience in both the general school sector and the co-operative trust sector. They organise the network of co-operative schools, of which the Alliance will be part. They will also help bring a global dimension to the school and assist in establishing national and international links with other co-operative organisations.  |
| **Trust Forum or** **Council**  | 2 reps | This will provide a mechanism for active engagement of key stakeholder groups and provides a sounding board for our local communities. It will ensure that our plans and implementation are in line with community aspirations and will seek to engage the community in dialogue with the Alliance.  |
| **External Partners**  | 1 trustee | To engage fully with the Alliance, to share and support mutual aims that are in keeping with co-operative values and principles.  |

## Appendix C: Governing Body Structure

From 1 September 2012, the governing body of a foundation school with a ‘minority’ Trust as its foundation, which is what we are proposing, has to be composed as follows;

* The Headteacher;
* One staff governor;
* At least two parent governors;
* One Local Authority governor;
* At least two, but no more than 45% of the total, foundation governors appointed by the named Trust; in our case we are proposing the legal minimum of two.
* As many co-opted governors as the governing body consider necessary. The total number of co-opted governors who are also eligible to be elected as staff governors must not exceed one-third of the total membership of the governing body, you must also count the Headteacher position in this figure.

In our case we are proposing that changes should be minimal when compared with the ‘old’ (Pre-September 2012) composition of our Governing Body.