

# Invitation to Submit an Expression of Interest

A new 420 place primary free school to serve  
new housing at Charlton Hayes

6 May – 10 June 2016



Department for Children, Adults and Health  
[www.southglos.gov.uk](http://www.southglos.gov.uk)

## Introduction

Where a Local Authority identifies the need for a new school in its area it must seek proposals to establish an academy (Section 6A of the Education and Inspections Act 2006). South Gloucestershire Council is inviting expressions of interest from proposers to open a new 420 place primary school from September 2019 to serve the new development at Charlton Hayes in Patchway. This school would be deemed a free school.

The Council wishes to hear from proposers for this school who can demonstrate their passion and ability to drive up standards and excellence for the children of South Gloucestershire and who are committed to maximising educational opportunities in order that every child may achieve his or her full potential. In particular, the Council wishes to receive expressions of interest from ambitious sponsors with a vision for expanding provision in line with the growing needs of the new community at Charlton Hayes. Sponsors will need to demonstrate how their education plan will provide high quality primary school places for all children.

It is important to note that the Secretary of State will consider entering into a funding agreement only with an approved sponsor. New proposers will need to be assessed by the Department for Education (DfE) through the normal sponsor route. Information on the DfE's sponsor approval process can be found at <https://www.gov.uk/sponsor-an-academy> Proposers that are not approved by the DfE should contact the DfE at the earliest opportunity and well in advance of submitting a formal proposal to the Local Authority (LA).

This document explains:

- (a) the application process including the decision making process and timescales;
- (b) why a new primary academy is necessary;
- (c) where the new academy is to be located including details of the development/geographic area, access and transport links;
- (d) the specification of the new academy including details of:
  - (1) school site area, accommodation and site tenure
  - (2) date of opening, admissions and phased entry arrangements
  - (3) funding arrangements/details of the Section 106 Agreement

Attached

- Appendix 1 Capacity of existing local school provision
- Appendix 2 Assessment Criteria
- Appendix 3 Application Form

## **Application Process**

Proposers should complete the Free School Presumption application form attached at APPENIDIX 3.

The application should clearly set out how you meet all of the assessment criteria provided at APPENDIX 2.

Initially, your bid will be assessed by a selecting panel against the assessment criteria. Each of the three criterion headings will be given equal weight and the Council will invite shortlisted sponsors to interview as part of the process where there will be an opportunity to present and clarify details of your proposal as necessary.

**Shortlisted sponsors will need to be available for interview in the week commencing 4 July 2016.**

Completed bids may be submitted either electronically or by post to:

Tanya Smith  
Strategic Lead - School Place Planning  
Department for Children, Adults and Health  
South Gloucestershire Council  
PO BOX 298  
Civic Centre  
High Street  
Bristol  
BS15 0DQ  
Email: [tanya.smith@southglos.gov.uk](mailto:tanya.smith@southglos.gov.uk)

**The deadline for bid submissions is Friday 10 June 2016 by 5pm**

## Decision Making Process

Once all the proposals have been received the Local Authority will:

- (i) send details of all applications to the Secretary of State;
- (ii) seek the Department for Education's (DfE) views on the applications to inform the Local Authority's assessment. This will be in the form of written feedback on each sponsor from a DfE official prior to the assessment;
- (iii) assess all proposals received and recommend its preferred sponsor to the Secretary of State. The Secretary of State's decision is delegated to the Regional Schools Commissioner (RSC). The Regional School Commissioner (RSC) for the South West will consider the local authority assessments and recommendations before deciding which proposer is in the best position to take forward the new school. The RSC will inform the local authority and the successful proposer of its decision, and the local authority will inform any unsuccessful proposers.

## Timescales

Activity	Deadline
Closing date for proposals	10 June 2016
Shortlisted sponsors to be invited to interview	4 July 2016
LA to recommend preferred sponsor to SoS delegated to RSC	8 July 2016
RSC to consider LA assessment of sponsors and inform LA of decision of preferred sponsor	September 2016

## Contact Details

If you wish to discuss your application, please contact:

Tanya Smith  
Strategic Lead - School Place Planning  
South Gloucestershire Council  
Department for Children, Adults and Health  
PO BOX 298, Civic Centre,  
High Street, Bristol.  
BS15 0DQ  
Email: [tanya.smith@southglos.gov.uk](mailto:tanya.smith@southglos.gov.uk)

## **Why is a new primary academy necessary?**

South Gloucestershire is an area of significant growth and population estimates identify an increase in the current population (c. 266,000) of 2,500 people per annum for the next 5 years.

The Council's vision for managing growth up to 2027 is set out in the Core Strategy. The Core Strategy makes provision for a total of 28,000 new homes. Around 5,000 have already been built and 23,000 new homes will be built in a 13 year period at an average rate of 1,700 dwellings each year. The focus for development up to 2016 will be the existing Local Plan sites which includes the development of Charlton Hayes.

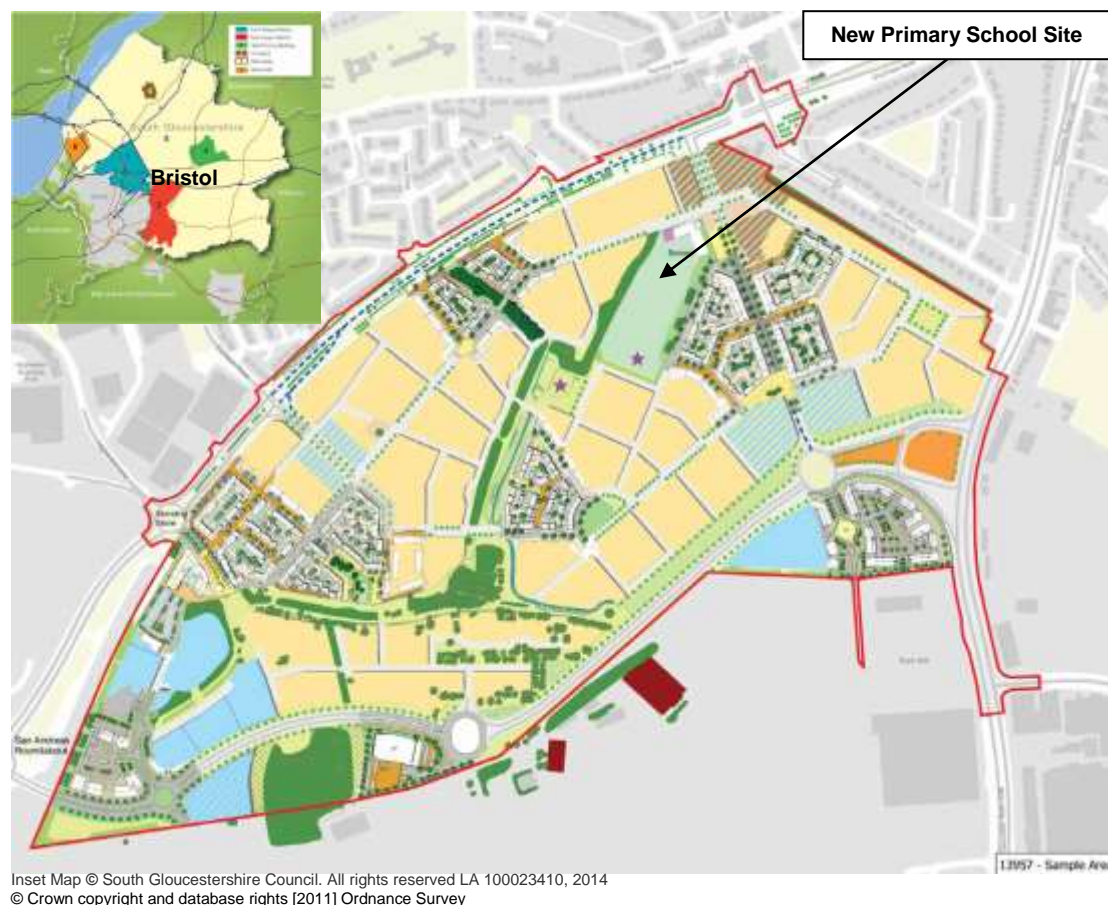
Charlton Hayes is a major mixed use scheme comprising residential development of up to 2,400\* dwellings together with the provision of supporting infrastructure and facilities including; new vehicular and pedestrian accesses to Highwood Road, new link road, public open space, community building and a hotel. \*Initially, planning permission was approved for 2,200 dwellings though following a viability appraisal in 2011, an additional 200 dwellings was approved outside of the original Section 106 package.

The Council will ensure that the necessary educational infrastructure is planned at the right time and in the right locations to support this growing new community. The development at Charlton Hayes is estimated to yield just under 900 primary school age children. Half of these children yielded will be accommodated in existing local primary schools with the capacity to expand. The other half will be provided for by the new 2 form of entry primary school. In accordance with local and national policy, the Council has secured both land and a financial contribution for this purpose.

## Where is the new school to be located?

The Charlton Hayes development comprises 81 hectares of land located north of Filton Airfield, south east of Highwood Road, south of Callicroft Road and west of the A38 Gloucester Road.

### Map 1 Charlton Hayes Development - Location



## When is the academy planned to open?

Occupation of the first new homes on Charlton Hayes was in 2010. Since then, on average, the developer has built 200 homes per annum. Work across the whole development is expected to be complete around the year 2021/2022. Existing local schools are expanding to ensure children across the whole of the development have access to local school provision. It is vital that the availability of additional and new school places is provided in a planned and measured way to avoid over-provision and sustainability issues. Given these considerations, the Council is inviting expressions of interest from all potential sponsors for the new school to open in September 2019.

## School Specification

The new academy will benefit from new build accommodation to serve the community of the Charlton Hayes development. The new primary academy will offer a total of 420 places (equivalent to two forms of entry) for boys and girls aged 4-11.

## **Nursery/Pre-School Provision**

The Section 106 agreement between South Gloucestershire Council and the Developer(s) sets out provision of accommodation in the Charlton Hayes Neighbourhood Centre for a 60 place nursery to be transferred or leased to a private or voluntary childcare provider. Consequently, there was no agreement for funding towards pre-school accommodation on the school site.

## **School Land/Site Accommodation**

The Section 106 agreement between South Gloucestershire Council and the Developer(s) sets out the provision of a 2 hectare site for the new primary school. Transfer of ownership from the developer to the Council will take place under the Deed of Undertaking referred to in the Section 106 Agreement.

The new school will operate on a single site. The site will be easily accessible to all and the building project will, as a minimum, address Part M of the building regulations in order to meet the needs of pupils, visitors and staff. The accommodation will be provided in line with the current DfE building bulletins and guidance for primary provision.

The Council has already commissioned a feasibility study to provide a 2 form entry primary school. Detailed design work is at an early stage and sponsors will therefore have the opportunity for involvement in the design of the school building. It is expected that the successful sponsor will work closely with the project management team and contractors to ensure that as far as possible the design supports their educational vision. The location of the school in relation of other new community facilities planned on site as part of a 'local centre' is shown on Map 2 below.

## **Site tenure**

The site tenure will depend on the outcome of the sponsor selection process and status of the school but will be either by way of an Academy Transfer, a lease based on the model 125 year DfE lease, or by the freehold interest of the site designated for the new school. The timing of the grant of any such interests will be directly dependent on transfer of ownership to South Gloucestershire Council.

## **Admission to School**

It is anticipated that places will be available to children requiring a place in the normal year of entry (Reception) and that these children will age through the school to Year 6 over a 7 year period.

In line with the developer's build out rate, the Council would suggest that the school initially opens with an admission number of 30. This will increase to 60 in line with the number of completed homes but unlikely to be before 2021.

Sponsors will be expected to demonstrate how this will be managed as part of their proposal.

While the school will serve a diverse community and provide places for all local children, priority of admission will be afforded for children living on the developed land at Charlton Hayes. This may be achieved by creating an Area of Prime Responsibility (APR) identifying the area to be served by the school as part of a broader distance admission criterion. This will help prioritise admissions for the new and growing community and must form part of the determined admission arrangements for the Academy.

Information about the capacity and distance of existing local primary and secondary schools within a 2 and 3 mile radius of the development are set out at Appendix 1.

### **Home to School Transport**

No specific transport arrangements are deemed necessary given the close proximity of the site to children's homes.

The Local Authority will actively support the new academy in encouraging safe travel to school including walking and cycling.

### **Capital Funding Sources/The S106 Agreement**

Under Section 106 of the Town and Country Planning Act, 1990, South Gloucestershire Council agreed with the developer(s) 2 hectares of land and an indexed linked financial contribution of £4.935m to build a new two form of entry primary school for the 4-11 age range. The contract for the construction of the school must be let within 10 years of site transfer. The S106 was signed in March 2008.

### **Revenue Funding Sources**

**Start-up Costs:** South Gloucestershire Council will provide £42,000 for pre-opening start-up costs.

**Pupil growth funding:** South Gloucestershire Council will provide £50,000 to new primary schools for each of the first four academic years to cover diseconomies of scale and setting up structures.

**Formula funding:** Upon opening, the new academy will be funded and monitored by the Education Funding Agency (EFA) on the same basis as other academies/free schools in the LA area.

**Legal Costs:** The EFA provides a one-off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new free school through the Free School Presumption route.

**High Needs Pupils Top Up Funding:** The school will receive additional funding from the local authority for pupils aged 5 to 19 with high needs where



the local authority has commissioned the place. Schools are expected to fund the first £6,000 of additional educational costs for each high needs pupil from their formula funding.

### **Equalities and Impact Assessment**

As prescribed by section 9 of the Academies Act 2010 and section 149 of the Equality Act 2010, the local authority must assess the potential impact of any new school on existing educational provision in the area. The local authority must also consider whether the new school would impact on any groups with the following “protected characteristics”: age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation. The Council must, therefore, have due regard to the need to:

- i) eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010.
- ii) advance equality of opportunity between persons who share a relevant protected characteristic and those do not share it. This involves having due regard, in particular, to the need to:
  - remove or minimise disadvantage suffered by persons who share a relevant protected characteristic.
  - take steps to meet the needs of persons who share relevant protected characteristic that are different from the needs of people who do not share it (in relation to disabled people, this includes, in particular, steps to take account of disabled persons' disabilities);
  - encourage persons who share a protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.
- iii) foster good relations between persons who share a relevant protected characteristic and those who do not share it. This involves having due regard, in particular, to the need to tackle prejudice and promote understanding.

The organisation of school places, and admissions to those places, are required to comply with relevant legislation and Codes of Practice. Any change to school provision in an area would potentially affect all pupils in that area, including those from minority ethnic groups. None of the proposals under consideration have been assessed as having a negative impact in regard to any protected characteristic groups set out within the Equality Act 2010.

## Primary and Secondary Schools within 2 and 3 miles of Charlton Hayes

### Primary Schools within 2 miles Radius of development<sup>1</sup>

DFE Code	School Name	Net Capacity See Note 2	Distance in miles See Note 3
2166	Callicroft Primary	367	0.39
3435	Holy Family RC Primary	210	0.78
2171	Filton Hill Primary	210	0.90
2002	Coniston Primary	243	0.91
3439	Stoke Lodge Primary	438	1.15
3070	St Chad's Primary	243	1.18
2003	Little Stoke Primary	210	1.23
2170	Charborough Road Primary	245	1.43
2005	Wheatfield Primary	420	1.48
2010	Meadowbrook Primary	432	1.54
2172	Shield Road Primary	210	1.58
3410	Holy Trinity Primary	204	1.62
3126	St Michael's Primary (Stoke G)	210	1.69
4104	Bradley Stoke Academy	210	1.76
2340	Bowsland Green Primary	315	1.76
3042	Almondsbury Primary	315	1.90
2341	Bailey's Court Primary	420	1.92
	<b>Totals</b>	<b>4902</b>	

### Secondary Schools within 3 miles Radius of development

Information on the capacity of primary and secondary schools within a 2 and 3 mile radius of the development at Charlton Hayes.

DFE Code	School Name	Net Capacity	Distance in miles
4117	Patchway Community School	1429	1.05
4113	Abbeywood Community School	1217	1.59
4104	Bradley Stoke Academy	1114	1.76
	<b>Totals</b>	<b>3760</b>	

1. Centroid of development assumed to be X-359,773 ; Y180,940
2. Net Capacity as at May 2015 (DfE SCAP return).
3. Based on straight line distance from centroid of development to centroid of school.

## The Assessment Criteria

In order to evaluate your application, South Gloucestershire Council will form a panel of senior officers who will consider the evidence presented to judge the extent to which it meets the criteria outlined below.

The criteria used incorporate those set out in the DfE's guidance the free school presumption.

The capacity and quality of proposers will be assessed in respect of 3 key areas including:

- Section C Vision
- Section D Education Plan
- Section E Capacity and Capability

Further detail of each of these is set out below.

### Section C - Vision

This is your opportunity to tell us in your own words about the overarching vision for your school and how it informs your education plan. You will need to demonstrate in later sections that the vision is both deliverable and affordable within the available funding. Your vision should be coherent and consistent with the other sections of your application.

You do not need to provide details of your intended enrichment programme at this stage; however, if an enrichment programme is crucial to achieving your vision you should mention it in this section and provide more details in the education plan.

If you already have more than one school please provide a brief overarching vision for your chain and your planned expansion strategy (including how many schools you hope to have in total, geographical spread and timescales).

Please attach any letters from any partners you will be working with confirming the support they will provide before and after opening.

## 2. Education plan (Section D)

This is the heart of your application. Your education plan must explain how your school will achieve its education vision. There are 4 elements within this criterion:

- D1 - The curriculum
- D2 - Measuring pupil performance
- D3 - The staffing structure
- D4 - Ensuring inclusivity

## D1 The Curriculum

- Demonstrate that your proposed curriculum will be deliverable
- Offer a broad and balanced curriculum which places a suitable emphasis on English, mathematics and science (pre-16 only) and:
  - for nursery provision, set out how you will meet the requirements of the early years foundation stage (EYFS) for nursery and reception classes;
  - for 16 to 19, state what subjects will be covered, the range of qualifications offered and how these will meet the needs and interests of all students;
- Offer appropriate qualifications
- A list of subjects to be offered
- The length of the school day, including any enrichment time, making a distinction between compulsory and voluntary activities
- Details of enrichment and extended services, for example, breakfast clubs, sports clubs, homework clubs and music/art clubs

We will also assess the quality of the curriculum plan by how far it demonstrates that you have:

- An understanding of the expected pupil intake and their needs;
- A rationale for the type of curriculum proposed which is consistent with the vision. Please explain how it meets the needs of the expected intake, whilst having an ambitious approach to meeting those needs. If you are proposing to teach something other than the national curriculum, please reference (but do not copy and paste) evidence (where it is available) which demonstrates that it is a good and successful model (e.g. results of academic research);
- A strategy to assess and meet the needs of all pupils including looked after children, those requiring literacy recovery/intervention (including English as an additional language), the most able (gifted and talented), those with differing degrees of SEN and disabilities, and pupil premium;
- Strategies in place to support pupils to be successful when they enter and leave the school;
- For the nursery class element of the free school:
  - considered, where appropriate, offering the local authority funded early education flexibility to meet the needs of working parents; and/or you considered including provision for disadvantaged 2 year olds.

In preparing your application, it is important to note that:

- For primary schools, a broad and balanced curriculum should include, but not be limited to, the core subjects of English, mathematics and science and will need to support progression to secondary education as well as complying with the EYFS for nursery and reception classes;

## D2 Measuring Pupil Performance

- Describe how you will establish a baseline of students' current level of attainment (including external validation of this) and put in place an assessment and data tracking system that will allow pupil performance to be monitored and continuously improved.
- Have ambitious and realistic targets for pupil performance, behaviour and attendance, explaining why they are suitable to measure the delivery of your education vision, and what your strategy will be to achieve them.
- Explain how you will review success measures and targets regularly to improve the school's performance. This could include benchmarking assessment data with other relevant schools.

We will also assess the quality of your plans to:

- Use appropriate data to inform teaching and drive progression and attainment for all pupils;
- Liaise with and report progress to parents.

## D3 The Staffing Structure

Provide details of a staffing structure that will deliver the planned curriculum within the expected income levels with a focus on outstanding teaching (including strategies for effective performance management) and a commitment to children.

If you have (an) open state-funded school(s) with a strong track record and are planning on replicating the staffing model, please:

- Provide an organogram based on the school you are replicating (or on your trust-wide staffing model if you are comparing the new school to your whole cohort), showing the proposed staffing structure for teaching and support staff each year until the school is at full capacity in line with planned pupil numbers (including for nursery and sixth form provision, where applicable). You can either provide one organogram and colour-code which members of staff arrive in which year, or you can provide several organograms if that is clearer;
- Show how you would focus on measuring and improving quality of teaching;
- Tell us whether you intend to use any of your existing staff in the new school(s) and if so how will this work in practice.

We will also assess the extent to which your staffing model matches the curriculum you have proposed.

If you do not have (an) open state-funded school(s) with a strong track record or you are not planning on replicating an existing staffing model, please:

- Demonstrate that as the school grows to full capacity, you will have an affordable staffing structure and sensible phasing plans that deliver a suitable (interim/developing) curriculum plan. Provide an organogram showing the proposed staffing structure each year until the school is at full capacity in line with planned pupil numbers (including for nursery and sixth form provision, where applicable). You can either provide one organogram and colour-code which members of staff arrive in which year, or you can provide several organograms if that is clearer;
- Show how you would focus on measuring and improving quality of teaching;
- Demonstrate that at full capacity, your staffing structure is sufficient to deliver the curriculum plan; consistent with the information provided in the budget plans; affordable; and includes strategies for effective performance management;
- Demonstrate that at less than full capacity, your staffing structure is sufficiently flexible to respond to reductions in funding and can still deliver a sufficient curriculum, including an overview explanation of how you would approach making savings. To do this you should explain the actions you would take to reduce costs; the reasons for these actions; and the reason you have prioritised the actions as you have. You should explain how your amended plans would continue to support delivery of your education vision and plan and any changes you would have to make to the education plan;
- If you have existing schools but are still completing this longer information (eg because your existing schools are for a different age-range), you should also tell us briefly whether you intend to use any of your existing staff in this school and if so how this will work in practice.

For any nursery element of your free school:

- State whether or not your early years provision will be led by a qualified teacher. Please refer to the statutory framework for the early years foundation stage for staff-to-child ratio options, as there may be implications for funded early years places, depending on the staff-to-child ratio applied. Please speak to the local authority about this.

We will also assess the quality of the staffing structure through the extent to which:

- It includes an appropriate balance of roles, experience and expertise eg senior leadership team, middle managers, SENCO, subject leaders, teachers, support staff, personal coaches etc;
- You have credible contingency plans to adapt your staffing structure and still deliver a sufficient curriculum if income were less than expected;
- The changes proposed, if there were a reduction in income, would result in an affordable, good quality education plan which would be consistent with the vision for the school; and reflective of its particular characteristics.

## D4 Ensuring Inclusivity

**The school will be welcoming to pupils of all faiths/world views and none. All applicants must demonstrate:**

- That the school will be welcoming to pupils of all faiths/world views and none; and show how the school will address the needs of all pupils and parents;
- How the curriculum will be broad and balanced and prepare children for life in modern Britain including through the teaching of spiritual, moral, social and cultural (SMSC) education. Consideration must be given to relevant issues, for example how the school will teach PHSE, adhere to the Prevent Duty and have appropriate policies on safeguarding and welfare;
- How the school will promote fundamental British values of democracy, the rule of law, individual liberty, and mutual respect and tolerance of those with different faiths and beliefs;
- How the school will aim to attract pupils from different backgrounds and different communities so that they all feel welcome and play a full and active role in the school;
- How the school will aim to encourage pupils from different communities, faiths and backgrounds to work together, learn about each other's customs, beliefs and ideas and respect each other's views.

In order for us to assess your application for a school with a religious ethos or religious character or a distinctive educational philosophy, please also provide:

- A brief explanation of how the school's religious ethos or character will be reflected in the curriculum. This should include: the proportion of the school's timetable devoted to religious education and other subjects that include some faith-based teachings or use faith-based materials; how the planned approach will help to prepare children for life in modern Britain; elements of subjects that could overlap with faith teaching (for example, if a proportion of language teaching includes faith-based material); what time will be devoted to worship, reflection time and prayer and how this will be inclusive to pupils of different faiths or none;
- A brief summary of the alternatives to prayer and religious study that will be available for pupils of a different faith or of no faith;
- A brief summary of how school policies affect pupils of other faiths or of no faith. -This must include consideration of the school's uniform and school meals policies, including the wearing of religious symbols; and any dietary requirements. It must also address the religious education curriculum, the arrangements for collective worship, and the criteria for staff appointments to the school;
- Information about engagement and consultation with diverse local community groups, faith authorities and parents demonstrating how you will seek to attract pupils of different faiths and backgrounds to the school.

## **Section E – Capacity and Capability**

You need to demonstrate that your group has the capacity and capability to set up and run the school(s) you are proposing and that you have access to appropriate educational, financial and other expertise, either within your group or externally. It is highly recommended that you talk to your RSC about your governance arrangements and your capacity to expand before you submit any application – please include written confirmation of the outcome of that discussion. We will assess the quality of your plans to fill the gaps you have identified, and where applicable, the track record of any individuals you have already identified to fill the gaps.

### **E1 The necessary experience and credentials to deliver the school to opening.**

If you have written confirmation from your RSC saying how many free schools you currently have the capacity to open, please include a copy as well as providing the following:

- Who will be in charge during pre-opening and provide their CV;
- Who will be your principal designate, if you already know who this is, and provide their CV. Similarly, who will be your executive head, if there will be one. If you do not yet have a principal designate (and likewise if you intend to have an executive head, but they are not yet recruited), you should provide a short timeline (less than one page) for your planned recruitment exercise(s);
- You should outline the missing skills and experience (if any) from your team, including: managing school finances; leadership; project management; marketing; human resources; safeguarding; and health and safety. You should consider gaps at an operational level and gaps in your board of governors/trustees and how you plan to fill those gaps. Where you have identified people to fill these gaps, please provide the CVs. We expect you will probably have more gaps to fill if you are proposing a type/phase of school that does not already exist in your trust.

### **If you don't have a letter from your RSC you will also need to provide the information below:**

- Demonstrate that you have, or have access to, individuals with strong relevant education expertise (for example, strong school improvement experience, a headteacher of a school that meets the definition of a strong track record as outlined in the introduction) and finance expertise with specific and sufficient time commitments. You will need to include: managing school finances; leadership; project management; marketing; human resources; safeguarding; and health and safety.
- Information about each individual who is part of your group, including:
  - Name;
  - Where they live (ie town/city);



- Role in pre-opening and once the school is open (if any). Please include whether the individual is part of the core applicant group or someone whose support you are accessing. If the latter, please indicate whether you would expect this support to be provided on a paid, at cost, or voluntary basis;
- Summary of all relevant expertise (eg educational, financial, including any relevant educational results/achievements) – this can be via a CV;
- Approximate time commitments for all the individuals named in pre-opening (in hours per week).

We will assess the quality of:

- Your skills gap analysis and your strategy to fill the gaps you have identified;
- The track record of the individuals you have listed as experts in the areas named above;
- The individuals with education and finance expertise form part of your core group.

**E2 A governance structure, and roles and responsibilities that will ensure accountability and effective decision making in this academy trust and drive improvement in the new free school**

If you have a letter or email from your RSC confirming your governance arrangements are robust, please include a copy as well as providing the following:

- What changes, if any, you need to make to your existing governance structure, roles, and responsibilities, or schemes, or delegation in order to ensure your trust continues to exercise strong accountability for your free school(s) both before and after they open, and for the rest of your trust.
- Include a brief description of any specific conflicts of interest and an explanation of how you intend to manage them. Declare any financial transactions that are likely to take place between any member/trustee (or a connected party/business) and the academy, the nature of the transaction(s) and that they will comply with the 'at cost' principles set out in the Academies Financial Handbook;
- We will assess the quality of your plans to manage conflicts of interest (if any) and whether any changes you are proposing will help ensure your trust continues to exercise strong accountability.

**If you don't have a letter from your RSC you will also need to provide the information below:**

- A diagram, in line with accepted academy trust models and in line with the Academies Financial Handbook, showing your proposed governance structure, including lines of accountability between the company members, the school's trustees, any local governing bodies or committees and the school's senior leadership team.

- The governance structure should cover all elements of the proposed school, including nursery, where applicable;
- A brief explanation of the roles and responsibilities of the company members, the trustees, any proposed committees and the principal;
- A strategy for avoiding and minimising conflicts of interest and for securing independent challenge to members and trustees;
- A plan to recruit and train any high-quality individuals you need, particularly those with education, school governance, and finance expertise (this will apply to your whole trust board if you do not yet have one; if you already have a governing body / trust board you should set out how you plan to recruit and train high quality individuals for any skills gaps you may have);
- We will also consider the proposed size and structure of your board of trustees and whether it will enable effective decision making.

**Application Form  
A New Primary Free School in Charlton Hayes**

You should use this form to provide all the necessary information and evidence for your proposal.

If you would like further information or wish to discuss your application, please contact South Gloucestershire Local Authority using the contact details set out in the specification.

**Please return your completed application form to the address set out in the local authority's specification and within the specified deadline.**

**Section A – APPLICANT DETAILS**

Name of organisation

Contact details (name, email address, phone number, and postal address)

How would you describe your organisation?

When did you become a DfE approved sponsor?

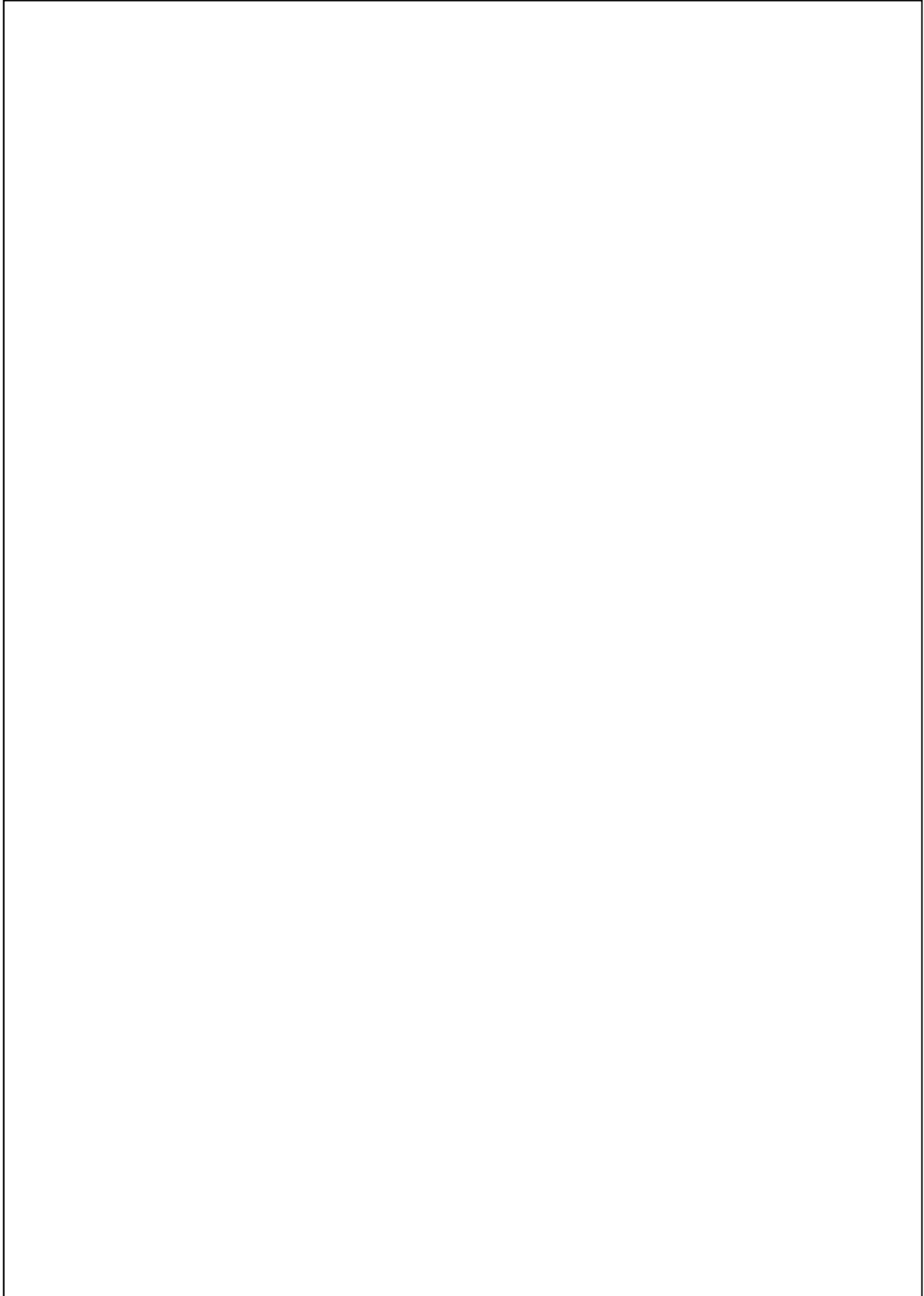
Do you currently run any existing schools, academies or free schools? If so, please give details, including the most recent Ofsted and attainment data for each. Please add additional sheets as necessary.

Did you put this application together with support from another company or organisation? And if so, please provide details about this organisation.

Please explain how your organisation's knowledge and experience of the local area would be used to inform your plans to establish this particular school.

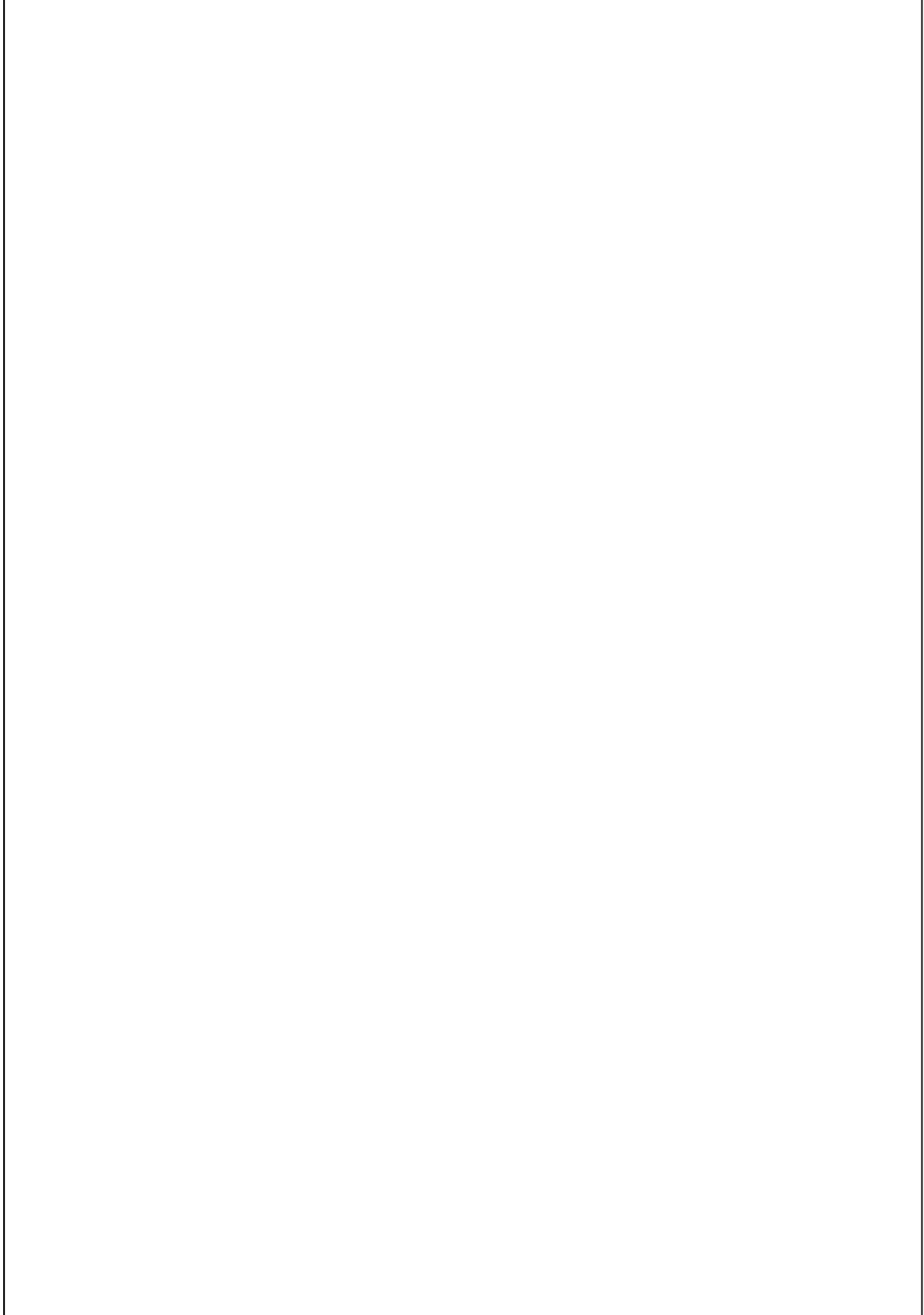
**Section C – VISION**

Please explain your vision and how it meets the requirements in the published specification. Please add additional sheets as necessary.

A large, empty rectangular box with a thin black border, intended for the user to write their vision statement and explain how it meets the requirements in the published specification.

**Section D – EDUCATION PLAN**

Please explain how your educational offer/curriculum plan meets the requirements in the published specification. Please add additional sheets as necessary.

A large, empty rectangular box with a thin black border, intended for the user to write their educational plan. It occupies most of the page below the instructions.

**Section E – CAPACITY AND CAPABILITY**

Please explain and provide evidence of how your organisation would meet the requirements in the published specification. Please add additional sheets as necessary.

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