

**SOUTHEND EDUCATION TRUST  
(formerly The SCOLLAR Trust)**

**STRATEGIC PLAN**

**APRIL 2009 – AUGUST 2011**

**Approved by Board of Trustees .....**

Registered Company No. 5093237  
Registered Charity No. 1105064

## **Contents**

### **1. Executive Summary**

### **2. Introduction**

- 2.1 Vision
- 2.2 Mission
- 2.3 Aims and Objectives
- 2.4 Values
- 2.5 Social Aim
- 2.6 Added Value/USP
- 2.7 Highlights

### **3. The Organisation**

- 3.1 Legal Structure/Ownership
- 3.2 Organisational Structure
- 3.3 Core Staff Team
- 3.4 Management Team Gaps
- 3.5 Operations
- 3.6 Monitoring, Evaluation and Measuring Impact
- 3.7 Quality

### **4. Projects and Contracts**

- 4.1 Portfolio of Products
- 4.2 Future Products
- 4.3 Partnerships

### **5. The Market**

- 5.1 Trends in the Market
- 5.2 Competitors
- 5.3 Market segmentation
- 5.4 Positioning Statement

### **6. The Marketing Plan**

- 6.1 Branding
- 6.2 PR and Publicity
- 6.3 Online Presence

### **7. Appendices**

- Appendix 1 - Policies and Procedures
- Appendix 2 - Overview
- Appendix 3 - Structure

## **Executive Summary**

### **1. Priorities being addressed**

Southend Education Trust is a partnership of 54 schools and the Local Authority in Southend. The Trust is a large social enterprise company with charitable status formed to achieve our vision for Southend to be a “Learning Town”.

#### **Key Aims to 2011**

- To support schools and other agencies to work collaboratively to achieve the vision for Southend to be an exciting learning town
- To become a strong and sustainable organisation and the provider of choice for statutory commissioners for services for schools and/or for school aged children and young people by March 2011
- To deliver services of a high standard that have been designed and co-constructed with beneficiaries and commissioners

#### **Priorities 2009/10**

- Effectively develop, manage, monitor and evaluate existing contracts/projects in line with Company quality standards, funder’s requirements and client need.
- Start up new contracts/projects to meet the agreed priorities of the members
- Develop the business to ensure high quality and sustainability

### **2. Developments and achievements**

The two biggest achievements are;

- The successful establishment of Southend Education Trust (April 2008)
- The merger of it with The SCOLLAR Trust (April 2009)

These two actions provide evidence of the amazing commitment of Southend’s school leaders to collaboration and partnership for the benefit of all learners in Southend.

In forming the Trust, the schools have collectively agreed to commit £2.7 million a year for three consecutive years to a pooled budget to be used to enable them to address their collective priorities. Without the Trust these funds would have been devolved to individual school budgets with no ring fencing. In forming the Trust, they have agreed to be accountable to each other for collaborative spending decisions. To achieve this at a time when school budgets are under unprecedented stress is a clear indication that Southend’s school leaders understand the “partnership dividend” the system achieves from working together.

This outstanding demonstration of commitment led directly to The SCOLLAR Trust’s Board of Trustees agreeing to strengthen the collaboration further through a merger. The merger brought;

- An additional £1.5 million in unrestricted funds
- An established portfolio of contracts with an annual income of £60-100k
- A ready made well run third sector organisation to build on

The new merged organisation has;

- Agreed priorities, an operational plan and budget for the next two years

- Become the first third sector organisation to be awarded the PQASSO quality mark for the way the organisation is governed and run (externally evaluated by Charities Evaluation Services (CES))
- Maintained quality in the delivery of existing contracts and projects while managing massive change
- Started to implement the plan to achieve the vision for Southend to become a “Learning Town”
- Managed a large scale sharing good practice programme accessed by 54 schools and over 1,000 staff
- Accessed additional funding and opportunities through “Train to Gain” (25k) and Creative Partnerships (£300k)
- Been commissioned to deliver the exciting 1:1 tuition programme to support pupils in reading and maths

### **3. Impact on outcomes for children and young people**

impacts on;

- Reducing NEETS and exclusions and improving attendance and behaviour through the E2E Centre, counselling projects, learning mentor programme, primary mental health worker, 14-19 key worker, nurture units, National Programme for Specialist Leaders of Behaviour and Attendance (NPSLBA)
- Narrowing attainment gaps through 30 small scale targeted school based initiatives (£500 - £25,000)
- Raised attainment and aspiration through the Learning Town project, Primary Modern Languages (PML), international dimension work, outdoor learning, Philosophy for Children, the launch programme and curriculum work
- Strengthened Pupil Voice and Influence through the “Have your Say Pupil Voice” project and Creative Partnerships Learning Town project

The Trust has had positive impacts on other LAA targets and priorities such as community cohesion, strengthening the voluntary sector, enterprise, arts, culture.

### **4. How does performance now compare with other areas (e.g. using benchmarking of performance data or Ofsted children’s services evaluation criteria)?**

The organisation is unique. We are working on trying to identify similar organisations to benchmark against.

### **5. Challenges for the future and next steps**

The greatest challenge is to manage the transition from a commissioning organisation to a provider organisation able to generate earned income to sustain itself beyond 2011. To achieve this we will;

- need to develop our relationships with statutory partners
- earn credibility
- learn quickly about the commissioner/provider process
- ensure our statutory partners develop their knowledge and understanding of how to maximize our insider understanding of what schools need while not being compromised in the procurement/tendering process – co-construction of services

## **2. Introduction**

Southend Education Trust is a partnership of 54 schools and the Local Authority in Southend. The Trust is a large social enterprise company with charitable status formed to achieve our vision for Southend to be a “Learning Town”.

Southend Education Trust was set up in April 2004 as The SCOLLAR Trust but changed its name in April 2009 when it merged with the organisation known as Southend Education Trust. Since its set up in 2004 the company has grown in size and taken on the role as the organisation that supports and facilitates collaborative work across schools in the Borough. It has a trading company, Scollar Associates, that works across the whole of the Eastern region and beyond generating income to support the Trust’s activities in Southend.

This business plan has been agreed by the Board of Trustees and covers the period from April 2009 to March 2010. It outlines how the new merged organisation plans to develop over the next year.

The company has grant income, reserves and existing contracts that cover all the planned activities outlined to April 2011 but needs to secure new contracts, SLA’s, grants and/or sponsorship of at least £1-2 million a year from April 2011 to ensure its sustainability beyond then.

The key objectives for the year are set out in more detail in Appendix 3.

### **2.1 Vision**

The vision is to help Southend become a Learning Town.

### **2.2 Mission**

Southend Education Trust wants to be a highly respected organisation that supports schools and other agencies to work together to make Southend an exciting place where learning is valued, the best people want to work and all our children and young people have high aspirations, great opportunities and the support they need to achieve the best they can.

### **2.3 Aims**

Southend Education Trust’s main aims are;

- to support schools and other agencies to work collaboratively to achieve the vision for Southend to be an exciting learning town.
- to become a strong and sustainable organisation and the provider of choice for statutory commissioners by March 2011
- to deliver services of a high standard that have been designed and co-constructed with beneficiaries and commissioners.

## **Objectives**

The Trust has agreed four key objectives;

### **1. Developing a Learning Community by;**

- Encouraging staff, children, young people and families to see themselves as members of an exciting learning community
- School leaders becoming as concerned about the improvement of other schools as they are about their own
- Encouraging and supporting strong partnerships between schools and other agencies
- Sharing good practice and resources

## **2. Developing a Southend Curriculum**

that shapes the future so that young people become successful learners, confident individuals and responsible citizens

## **3. Providing Support for Learning;**

to help families and students access opportunities and overcome barriers to learning

## **4. Developing the Workforce**

providing excellent opportunities for staff and volunteers to ensure we attract and retain the best workforce for our children and young people

## **5. Developing the business;**

in to a sustainable highly respected social enterprise that plays a leading role in the voluntary sector in Southend.

## **2.4 Values**

The Trust's work will be based on the values of;

**Collaboration** – Southend Education Trust believes the Partnership is strongest when it works together. It will support confident institutions to shape and lead the system together. It will ensure a strong influential voice to staff, students, parents and carers.

**Trust** – We believe in building trust between our members and others we work with. We know that when there are high levels of trust things get done quicker, better and easier and with more fun because we do not need so many checks and so much bureaucracy. To achieve this, members need to demonstrate integrity, be open about their motives, have the capability to do what they have agreed to do and always do what they say they will

**Innovation** – Southend Education Trust believes that the Partnership is innovative in its approach to achieving its goals and we will strive to be creative and original in all our work. We will be open to new ideas and willing to take risks together

**Inclusiveness** – Southend Education Trust values the diversity and differences within the Partnership and strives to be inclusive in all aspects of its work, acknowledging different needs and being tolerant of different views encouraging honest dialogue on points of difference

**Passion** – Southend Education Trust believes the Partnership is built on the passion of individuals and organisations to make a positive difference. Southend Education Trust will be passionate in its support of the Partnership and its members by being optimistic, excited by new ideas, inspiring others, persevering and being determined to succeed

## **2.5 Social Aims and Public benefit**

Southend Education Trust is a company limited by guarantee with charitable status and a trading company known as Scollar Associates. The Trust's charitable object is to advance

education for the benefit of the public, in particular by providing and assisting with the provision of additional and/or new learning opportunities, and any other charitable purpose.

Our trading company, The Scollar Associates generates £50-60k a year by providing interim management consultancy and project management to public sector organisations mainly in the east of England. We have recently employed a Business Development Executive who we hope will increase the annual surplus to £100k by 2011.

The surplus generated is wholly owned by Southend Education Trust and is used to fund our charitable activities.

The organisation is independent and able to make its own decisions.

The work of the Trust enables us to work with schools to improve the quality of education available and thereby enhance the lives of children and young people in Southend.

## **2.6 Unique selling point and added value**

The Trust is unique. It is the only organisation of this size and type operating in the UK. It supports the work of our statutory partners and really understands the needs of our clients and beneficiaries because they are our members. This enables us to ensure the provision we deliver is matched to need in a responsive and flexible way that no other organisation working with schools in Southend does.

The Trustees undertake a comprehensive risk assessment at least annually and have secured sufficient reserves to enable it to operate effectively.

## **2.7 Highlights**

The two biggest achievements are;

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### **Projects and contracts prior to 2009**

We have successfully designed and delivered projects and innovative education and training initiatives within the primary, secondary, further education and voluntary sectors. These have included;

- An initiative to widen and increase participation in higher education (Aimhigher)
- A project to encourage and develop vocational provision for 14-16 year olds in Southend (Optima project)
- An initiative to help recruit and retain teachers and provide role models for students in school (Student Associates Scheme)
- A project to ease the transition for pupils with special education needs leaving special school at the age of 16, helping them move seamlessly into employment or training (Entry to Employment) St Nicholas School
- A project to provide placements for 32 young people in the construction industry from the age of 14 which could lead them into modern apprenticeships at age 16 (Future Builders)
- The establishment and successful launch of the Scollar Associates. A company which operates as the trading arm of Southend Education Trust delivering services to local authorities, voluntary organisations and educational providers
- The successful bid for funding and subsequent setting up of Southend United “Playing for Success Centre” until it was mainstreamed in 2004
- The successful bid for funding and subsequent management of the School Sport Co-ordinator project until it was transformed in 2004 and taken over by 2 hub schools
- The successful bid for funding and subsequent leadership and management of the 14-19 Planning Group (MixIt) until it was transformed in 2005 into the 14-19 Planning Group
- The successful initiatives branded under the Southend Excellence cluster including ;
  - Learning Mentors
  - Gifted & Talented provision
  - The Behaviour Improvement project
  - Primary languages and International Dimension

### **3. The Organisation**

#### **3.1 Legal Structure**

Southend Education Trust is a company limited by guarantee and a registered charity. It has a Board of Trustees of the charity who are also the Directors of the Company. The Company Secretary is the CEO of the Company. The structure provides transparency, limits risks, allows the organisation to be independent by being a legal entity in its own right able to employ staff and enter into contracts. The structure requires the organisation to conform to strict regulation and high standards of probity.

#### **3.2 Organisational Structure (see Appendix 4)**

##### **3.2.1**

The organisation is two-tier with a Board of Trustees accountable to the members. The members are nominated by participating organisations or appointed for their skills, experience and knowledge. Members hold voting rights at general meetings. The members are responsible for;

- Considering the accounts and balance sheet
- Receiving reports from the Trustees and Auditors
- Appointing the Auditors
- Fixing the remuneration of Auditors
- Electing and/or removing Trustees

##### **3.2.2. The Board of Trustees**

The Board of Trustees is the governing body and has a purpose to further the charity's vision for Southend to be a Learning Town and to further the charity's objects. They have ultimate responsibility for directing the affairs of the Southend Education Trust and ensuring it is solvent, well run and delivering the outcomes for which it has been set up. Three-quarters of the Board are elected by the members from the membership and one quarter is appointed by the members for their relevant skills and experience.

##### **3.2.3 The Curriculum Steering Group**

The Curriculum Steering Group has delegated authority set out in terms of reference agreed by trustees. They are responsible for overseeing the running of the curriculum programme. The Chair is nominated by the Board.

##### **3.2.4 Audit and Risk Committee**

The audit and risk committee is selected by the trustees and reports to the Board of Trustees and Full membership. The Chair is a trustee.

##### **3.2.5 Remuneration and HR Committee**

The remuneration and HR committee is selected by the trustees and reports to the Board of Trustees and Full membership. The Chair is a trustee.

##### **3.2.6 Focused Management Groups**

Members of these groups will be nominated by participating organisations. They will oversee the individual programmes, projects and contracts. Their role will be to ensure the voice and views of the membership is harnessed and taken account of, monitoring the programmes and ensuring they are effective and develop.

### **3.2.7 Network Groups**

Network groups are groups of practitioners from participating organisations. They will be facilitated by a paid co-ordinator. Their role will be to share practice, offer support and contribute to building a learning community.

### **3.2.8 Membership of other organisations**

SET is an active member of Southend Association of Voluntary organisations (SAVS) and a member of the National Council of Voluntary Organisations (NCVO) which provides valuable advice, guidance and support particularly in the area of governance. The CEO is a member of the Association of Chief Officers of Voluntary Organisations (ACEVO) a board member of the Local Strategic Partnership (Southend Together) a trustee of SAVS and Prospects Learning Foundation and a governor of South Essex Partnership NHS Foundation Trust (SEPT). The Trust is also an active member of Southend Children's Partnership, Southend 14-19 Planning Group, Essex Aimhigher Partnership, Southend Joint Advisory Board and the three locality partnerships.

## **3.3 Core Staff Team**

The core staff team is small. It consists of a CEO, Finance Manager, Admin Manager, Admin Assistant. Scollar Associates employs a Business Development Executive. They work well as a team. The CEO has been in post since April 2004 when the company was founded and deals with both strategic and operational issues. She is accountable to the Board of Trustees and provides regular reports to them. She also manages the rest of the core team. The Finance Manager has been in post since April 2004 when the company was founded and deals with all financial and auditing issues. The Admin Manager has been in post since July 2007, she is the personal assistant to the CEO, manages the office on a day to day basis, deals with HR issues, data systems, communications and PR. She is assisted by a part time admin assistant. The Scollar Associates Business Development Executive is a new post created from June 2009 to grow and attract new business for the Associates and is accountable to the Scollar Associates Board of Directors.

The core team is stable, there is very low turnover of staff in key positions with most having been in post for the life of the Company. Contracts and projects are usually delivered by staff that have been seconded from other organisations, external consultants or staff employed on short fixed term contracts related to the length of the funding available for the project or contract. While this approach can provide some logistical difficulties it usually results in work of a high calibre delivered by people who are passionate about the work and focused on clear delivery targets and outputs.

## **3.4 Management Team gaps**

The current staff has very little experience in marketing, PR, communications or HR issues. It will be necessary to acquire external support from time to time to fill these gaps and the Organisation may soon need to consider a PR/Communications Officer to deal with this growing area of work.

### **3.5. Operations**

SET has worked hard to develop policies, procedures and systems that ensure the efficient running of the business. We have a comprehensive staff handbook, financial procedures and governance arrangements. All staff have contracts, job descriptions and performance management. Risk assessment is undertaken regularly. (see *appendix 1 for list of policies*)

### **3.6 Monitoring and Evaluation**

All services and projects are monitored and the data is collected and evaluated against agreed criteria. We are required to provide our funders and those that we have contracts with regular monitoring reports. We also collect additional information in order to carry out internal evaluations. All staff are involved in performance management.

### **3.7 Quality**

Southend Education Trust has achieved PQASSO Level 1 and is working towards PQASSO Level 2 while exploring other relevant quality marks.

## **4. Projects and Contracts**

The Company has a portfolio of projects and contracts. These include;

### **4.1 Aimhigher**

A contract with the Higher Education Funding Council for England (HEFCE) to deliver a programme to widen participation in Higher Education in Southend. It is managed by a Partnership co-ordinator and school based staff.

The clients are young people who are currently under represented in HE but who have the potential to benefit from HE. Aimhigher is about making everyone aware of the benefits higher education can bring whatever their background.

It involves providing additional resources and experiences for them and covers the age range from 13-19. The programme is free at the point of access.

The project has been running in its current format since July 2008. It appears to be successful but no data about entry to HE is yet available.

The programme is fully dependent on grant funding and will cease in 2011.

#### **Success criteria**

- Increased numbers of young people going on to HE/FE who fit the criteria for Aimhigher
- Aimhigher becomes embedded in the schools so that when the funding ceases the ethos and practice will continue
- Schools not identified in the current cohort of schools buy into the values and practice of Aimhigher

## 4.2 St Nicholas E2E Centre

The Centre delivers education and training for up to 20 post 16 students funded by the LSC through the NOVA Partnership. It is provided by a small staff of Centre Manager, 2 teachers and part time administrative assistant. The clients have Special Educational Needs and until age 16 attended special schools.

It involves providing relevant work based activities as a transition from school to work.

The students attend the Centre for up to 1 year.

The provision is free to students who receive payment for attendance.

The Centre is successful, has high stay on rates and completion rates.

The Centre has recently achieved funding for a new building and facilities and is undertaking a full strategic review to agree the best way forward for the next 5-10 years.

## 4.3 Student Associates Scheme

The SA Scheme offers undergraduates the opportunity to experience the teaching profession in a school or college through a 15 day placement for them to make an informed decision regarding Initial Teacher Training (ITT) following their degree.

The scheme is government funded through the Training and Development Agency for Schools (TDA) and SET has held the contract since 2002.

The clients are:

- TDA - to recruit more people into teaching  
-to raise aspirations of young people
  
- Undergraduates - taster of the teaching profession  
- utilising their skills and subject knowledge  
- flexible attendance in line with their Uni timetable  
- raise awareness of HE  
- valuable experience to enhance ITT application
  
- Schools - positive role models for pupils  
- improve pupils motivation and attainment  
- up to date subject knowledge to support teaching & learning  
- 88% feel the scheme has regional benefits for the recruitment and retention of teachers  
- 90% feel the scheme provides a realistic insight into the demands of the teaching profession

Undergraduates receive a bursary payment of £40 per day and schools are paid £225 per 15 day placement to cover any admin costs. The TDA set targets with priority subjects being Maths, Physics and Chemistry and we have met our target figures each year.

The scheme has been very successful and we now have approx 175 schools offering placements covering Essex, Hertfordshire and Suffolk

## **Success criteria for SET**

To raise the profile of the Trust within Southend and the wider area

To deliver services which meet the needs of Trustees

Recommendations from past commissioners of all our services

### **4.4 Employer Engagement Service**

A service to engage more employers to participate in education and provide safe, quality work placements for young people.

The service is delivered by an Employer Engagement Officer employed by the Trust and is providing the service for all Southend schools and the wider Essex area. The service will also include local work based training providers to accommodate placement experience for 16 plus young people.

The service is currently aimed at engaging young people that have difficulties within an academic environment, giving them the opportunity to participate in an extended work placement, the learner will be matched to an employer to the benefit of their learning needs, the placement activity will accommodate learners through years 10 and 11.

This is a free service starting in April 2009. The target for the service is to become self financing within 2 years.

### **4.5 CRB Service**

Our clients are education related and from the private sector. We provide a comprehensive service that includes liaising with our contracted companies, checking applications via the CRB website, another part of our service is to contact our companies should the application shown an individual has a past, nothing is disclosed to the company at this time due to the confidentiality of this service, we are notifying them to be aware when the application is forwarded.

The full process takes approximately 2 weeks, as this service comes under the Employer Engagement service with a plan to develop a marketing strategy to enable the expansion of this service.

## **Success Criteria for SET**

- higher profile within Southend and wider Essex area
- recommendations from past commissioners of our services
- sustainable

## **Success Criteria for Employer Engagement Service**

- higher profile within Southend and wider Essex area
- recommendations from past commissioners of our services
- self financing within two years

## **4.6 Scollar Associates**

Scollar Associates is the trading arm of the Trust. Any profits are gift aided back to the charity for the furtherance of its charitable aims. Its current focus is Educational and Management consultancy across the wider public sector and for businesses. The Trading arm had a turnover of £150,000 in 2007-8, but has yet to make a profit. To return a profit to the Charity the Trading Arm is being expanded to be the delivery arm of SET through the engagement of Scollar Associates consultants to deliver SET's programmes.

We will also:

- Provide Consultancy, Training and bespoke activities in LA's, Schools and the wider Public Sector and other organisations through winning contracts or through service level agreements
- Responding to the specific needs of Southend Schools and others in South Essex
- Developing new products and services

By 2010 we plan to increase turnover by £100,000 and by £150,000 in 2011 this will contribute to the sustainability of SET.

## **4.7 Developing a Learning Community**

This consists of several projects to encourage members to;

- see themselves as belonging to a learning community
- be as concerned about the improvement of other schools as their own
- share good practice and resources

### **4.7.1 The website, newsletters and Fronter Learning Platform**

The core team provides this as an information/communications service. The clients are members, school staff, stakeholders, trustees.

It involves keeping a website up to date, publishing newsletters and maintaining an accurate and interactive service using the Fronter Learning Platform.

The service is free to all.

The service is still in development

The service will be funded by Trust funds to 2011 when it may have to levy a subscription if it is to continue.

The number of clients is unknown.

This service is key to the success of the Trust and will need significant investment over the life of the business plan.

### **4.7.2 The Launch programme**

This service was provided jointly by the core team and Trust schools.

The clients are staff in Trust schools.

The service consisted of two elements;

1. those provided by Trust schools for Trust schools
2. those arranged by the core team. It was intended to be a means of sharing practice and helping schools get to know more about each partner schools. It ran from October 2008 to April 2009

The service was very successful (see full evaluation report May 2009)

The service was funded from grant income as a one off activity. It is not sustainable.

The number of clients was high at ?

There are no plans to repeat this activity

#### **4.7.3 Networks**

These groups are established and managed by paid project co-ordinators.

The clients are Trust school staff.

The service involves facilitating half termly meetings for various groups of staff each having a particular foci eg learning mentors, international dimension, school co-ordinators.

The meetings are usually held half termly after school and last for about 1 ½ hours.

The service is free to Trust schools.

The service is successful (see evaluation reports and attendance registers).

The current model is not financially sustainable.

The number of groups and members of each group is growing significantly.

This service is expected to develop into one that is financially sustainable after the life of the business plan through subscription.

#### **4.7.4. Have your say Voice and Influence project**

This service is provided centrally and has a part time paid co-ordinator.

The clients are staff, families and pupils in Trust schools.

The project involves ensuring staff, pupils and families have a stronger voice and more influence over the services they receive. It has focused initially on auditing the current situation in relation to pupil voice in schools and in particular the role of school Councils.

The project will run for 3 years.

The service is free to Trust schools

The project is in development.

The project is not financially sustainable but dependent on grant income

The number of clients is growing significantly as schools engage with it.

The plans to develop this project will depend on review and evaluation of this first phase.

#### **4.7.5 The Learning Town Project**

##### **Creative Partnerships in 13 schools**

This includes staff and pupils in 13 selected schools working with creatives on individual school projects culminating in a joint event on 2 July 2009. The overall aim is to ask pupils for their views about the development of The Learning Town and provide them with creative opportunities to express those views.

The project runs from October 2008 to July 2009.

The service is jointly funded by Creative Partnerships, SET and the selected schools.

The service is in development so impact is unknown. An evaluation will be carried out in August 2009.

The service is reliant on grant funding and not financially sustainable.

The service involves over 10,000 pupils and staff in 13 schools.

Our plans for the development of this service over the life of the business plan will depend on evaluation of this stage.

#### **4.7.6 Support for pupils with English as an Additional Language (EAL)**

The service is provided jointly by SET, Blade Education and English for England Ltd.

The clients are school staff, pupils and families.

It involves providing support for pupils and families newly arrived in Southend schools with EAL. The service is provided in three ways;

1. a support network for school staff offering advice and guidance
2. a DVD for pupils with information in 21 languages (ESIS)
3. a web-based resource to help teach English (English for England)

The service is free to SET schools

The service is still in development so impact is unknown. An evaluation will be carried out in August 2009.

The service is not financially sustainable in its current format.

The number of clients is growing as schools engage with the project.

Our plans for the development of this service over the life of the business plan involve evaluating the current provision and making decisions.

#### **4.7.7 Supporting Innovation**

This service is provided by the core team.

The clients are all SET schools.

It involves schools making a bid for funds to develop innovative practice to share with others.

The service will run from May 2009 to August 2010.

The service is free to SET schools

The service is in development some impact is unknown. Evaluation will take place in September 2010.

The service is not financially sustainable. It is dependent on grant funding although it is hoped some projects will become mainstreamed.

There are currently ? schools being supported.

Our plans for the development of this service over the life of the business plan will depend on evaluation of the current phase.

## **4.8 Developing a Southend Curriculum**

This consists of activities to encourage the development of a Southend Curriculum that shapes the future so that young people can become successful learners, confident individuals and responsible citizens.

### **4.8.1 Developing a Southend Curriculum**

The service has been provided by Edison Learning Ltd, SET core staff and SET school staff.

The clients are the Board of Trustees and SET schools.

The service involves implementing a feasible proposal for the development of the project over the next 2 years.

The service will run for three years to 2011.

The service is free to the Board of Trustees and schools.

The service is still in development so impact is unknown but evaluation will be undertaken in 2011.

The service is not financially sustainable. It is dependent on grant funding.

Our plans for the development of this service over the life of the business plan depend on evaluation of this phase.

### **4.8.2 Developing an International Dimension**

The service is provided by the core team, a paid co-ordinator and paid administrator based at SHSG.

The clients are staff in SET schools

The service involves providing advice, guidance and support for schools on the development of an International Dimension and achievement of the British Council International School Award.

The service is free to SET schools.

The service has been very successful (see evaluation reports and newsletters).

The service is not financially sustainable in its current format and is dependent on grant income.

Our plans for the development of this service over the life of the business plan involve marketing it and developing a buy back service.

#### **4.8.3 Primary language service**

The service is provided by the core team and a delivery team based at SHSG and SHSB. It is commissioned jointly by the LA and SET

The clients are staff in SET schools and the LA.

The service involves providing advice, guidance and support for schools on the development of a primary language programme.

The service is free to SET schools.

The service has been very successful (see evaluation reports and newsletters)

The service is not financially sustainable in its current format and is dependent on grant income.

Our plans for the development of this service over the life of the business plan involve marketing the service and developing a buy back service.

#### **4.8.4 Social and Emotional Well Being and Philosophy**

The service is provided by Sapere, the core team and a paid co-ordinator.

The clients are SET school staff.

The service involves providing advice, guidance and support and training for school staff.

This is a three year project starting in April 2009.

The service is free to SET schools.

The service is still in development so impact is unknown. Full evaluation will be undertaken in 2011.

The service may be financially sustainable through developing our capacity to offer training across the region.

Our plans for the development of this service over the life of the business plan involve developing a social enterprise that meets the needs of SET staff and generates income to sustain itself.

#### **4.8.5 Outdoor Learning**

The service is provided by the core team, Essex Wildlife Trust and part time paid co-ordinators.

The clients are all SET schools, with a particular foci on 10 pilot schools.

The service involves providing advice, guidance support, training and resources to SET schools.

This is a 3 year project.

The service is free to SET schools

The service is in development so impact is unknown. Evaluation will be undertaken in 2011.

The service may be financially sustainable through developing our capacity to offer training across the region.

Our plans for the development of this service over the life of the business plan involve developing a social enterprise that meets the needs of SET staff and generates income to sustain itself.

#### **4.8.6 Assessment for Learning**

The service is provided by the core team and a paid co-ordinator.

The clients are staff in all SET schools.

The service involves providing advice, guidance, support and training and facilitating peer support and opportunities for collaborative enquiry.

The service is free to SET schools.

The service is in development.

The service is not financially sustainable.

Our plans for the development of this service over the life of the business plan will depend on the evaluation of the first year's activity.

#### **4.8.7 One to One Tuition**

Created to provide additional support in Maths and/or English, the programme has been set up to work alongside classroom teaching as extra one to one help for children and young people not reaching their potential

SET has been commissioned to deliver this service by the LA. It is provided by the core team, a part time paid co-ordinator and part time tutors.

The clients are selected pupils in SET schools.

The service involves recruiting, training and deploying tutors to work with identified students to raise attainment in English and maths.

The service will start in September 2009 for secondary and primary schools (some primary schools have been involved in a pilot from April 2009)

The service is free to SET pupils and schools and funded through a government grant.

The primary school pilot has been well received by schools and has pointed the way for future developments in both newly engaged primary and secondary schools.

The service is not financially sustainable beyond the life of the grant.

The number of clients is dictated by both the terms of the grant from the DCSF and the amount of funding from the DCSF.

Our plans for the development of this service over the life of the business plan will depend on funding and evaluation after the first year and the impact of the project on schools who may want to find it in the future.

## **4.9 Support for Learning**

This consists of activities to provide support for families and students to help them to access opportunities and overcome barriers to learning by;

### **4.9.1 Training and support for Learning Mentors**

Learning Mentors are skilled school based staff who support children, young people and their families overcome barriers to learning

The service is provided by a paid co-ordinator and link learning mentor.

The clients are school staff including current and prospective learning mentors.

The service involves providing advice, guidance, support, training and a facilitated network.

This service started in 2004 and is planned to 2011.

The service is currently free to SET schools but the withdrawal of government funding for the training of Learning mentors may mean a fee for this from September 2009.

This has been highly successful (see evaluation reports)

The service is not financially sustainable but may develop into one in the future through subscription and trading training.

The training continues to attract approximately 20 people a year.

Our plans for the development of this service over the life of the business plan include brokering new accredited training which staff and schools may wish to pay for.

#### **4.9.2 The Challenge for All service**

This service is provided by the core team and a part time paid co-ordinator.

The clients are targeted pupils in SET schools.

This involves providing support for pupils to help them overcome barriers to learning.

The service started in April 2009 and is planned to run until 2011.

The service is free to pupils/schools.

The service is still in development so impact is unknown. Evaluation will take place in 2010.

The service is not financially sustainable. It is dependent on grant funding.

Our plans for the development of this service over the life of the business plan involve a clear exit strategy to manage expectations.

#### **4.9.3 Primary mental health worker**

The service is provided by the PCT and funded by SET.

The clients are pupils, families and staff in SET schools.

The service involves providing advice and guidance for staff and direct support for pupils and families.

The service started in 2006 and will run to 2011.

The service is free for SET schools, pupils and families.

The service has had limited success due to problems with recruitment and retention.

The service is not financially sustainable. It is dependent on grant funding to 2011 but may be adopted by Children's Partnership Executive and mainstreamed.

Our plans for the development of this service over the life of the business plan involve a review and evaluation.

#### **4.9.4 Key Worker 14-19**

The service is provided by a full time key worker, staff in three schools and an independent supervisor.

The clients are disaffected and/or disengaged students in 3 secondary schools.

The service involves providing 1:1 support to help students overcome barriers to learning.

The service started in 2005 and is planned to continue to 2011.

The service is free to clients.

The service has been very successful (see evaluation reports).

The service is not financially sustainable. It is dependent on grant funding.

Our plans for the development of this service over the life of the business plan involve trying to find mainstream funding for it to continue.

#### **4.9.5 Counselling project at Belfairs School**

The service is provided by a service lead officer and team of counsellors.

The clients are pupils and families in seven primary schools.

The service involves providing counselling for students and families on a referral basis.

The service started in 2004 and is planned to continue to 2011.

The service is free to clients.

The service has been successful (see evaluation reports).

The service is not financially sustainable but could be made available on a buy back basis.

Our plans for the development of this service over the life of the business plan involve a review and evaluation and development of a viable business plan.

#### **4.10 Developing the Workforce**

This consists of activities to develop the workforce.

##### **4.10.1 Bursaries for staff to undertake collaborative enquiries**

The service is provided by the Board of Trustees, a paid administrator and an HE tutor from Cambridge University.

The clients are SET school staff.

The service involves staff applying for funds to carry out a collaborative enquiry.

The service started in July 2009.

The service is free.

The service is in development.

The service is not financially sustainable.

It is dependent on grant funding.

Our plans for the development of this service over the life of the business plan depend on the evaluation of the first phase.

## 4.11 Innovative Bids

The Trust wants to nurture innovative practice in Southend schools by offering schools the opportunity to bid for funds to pilot new ideas

## 4.12 Future products

Once we have established the new services being commissioned by the Trust and incorporated them with the existing successful SCOLLAR activities we want to expand and grow to deliver more services commissioned by statutory voluntary or private sector organisations. These new services will build on our expertise in training, project management, consultancy and education and learning. We intend to be the provider of choice for the Local Authority, Children's Trust, PCT and other national agencies and large organisations that are looking for good local providers with expertise and capacity to deliver services that have been traditionally managed in-house. It is our intention to develop and deliver all or some of the following new commissioned services by 2011;

- Music services for schools in the community
- Services to develop the children's workforce
- HR services for schools
- ICT services for schools
- Outdoor Education provision for schools and the community
- Sports and school PE services for schools and the community
- Additional support for reading and mathematics in schools

## 4.13 Partnership

SET works in partnership with a number of organisations and statutory bodies, these include;

- Southend Together
- Southend Borough Council
- SEEC
- University of Essex
- PCT
- SEPT
- Essex Wildlife Trust
- Edison Learning
- Creative Partnerships
- Prospects learning foundation

Many of our services depend on these partnerships, they provide financial support, expertise and are our commissioners. In return we provide;

- Service delivery to agreed outcomes and impacts
- Add capacity
- Offer access to schools, staff, students and parents
- Funds
- Expertise

It is essential that these partnerships are strengthened and developed so that SET becomes the provider of choice for them.

## **5. The Market**

SET is based in the Borough of Southend on Sea and this is the main market place. The Trust intends to sell services to schools, training providers, colleges, the University, the PCT and the Local Authority. We also intend selling our services further afield through our trading company, Scollar Associates. Our main competitors are other private and voluntary sector providers of educational services, the Local Authority and the provider arm of the PCT.

### **5.1 Trends**

SET is a large voluntary sector organisation and is well placed to take advantage of the opportunities that are offered by the policy favoured by the Government of engaging the voluntary sector in the delivery of public services.

### **5.2 Competitors**

We have several potential main competitors. Our key strategy is to try wherever possible to collaborate and partner with them rather than find ourselves in direct competition. They include;

The Local Authority  
The PCT's Provider arm  
South Essex Partnership NHS Foundation Trust (SEPT)  
RELATE  
Trouble Tree  
SSTP  
YMCA  
Prospects  
Edison Learning  
Trident  
Greensward consortium  
The University of Essex  
Essex Wildlife Trust  
SAVS

### **5.3 Market segmentation**

The market can be split into 5 main groups. They are

- National agencies
- Local 3<sup>rd</sup> sector organisations
- Statutory agencies
- Private sector companies
- Schools and colleges

### **5.4 Positioning statement**

SET provides a high quality service that is owned by its largest group of customers, the schools and responsive to their needs. Because of this insider knowledge and understanding the Trust is able to help statutory partners gain the support and confidence of schools and engage them in the design of services and then the delivery of services to high standards.

These services are then monitored continually and provide immediate and ongoing feedback. Unlike other providers the Trust is committed to use any profits or surpluses it makes solely for the benefit of children and young people in Southend. The Trust can also play a large part in strengthening local democracy by helping to strengthen the voluntary sector and building capacity and cultural capital for the town.

## **6. Marketing Plan**

SET is a relatively new organisation that needs to ensure it becomes known to potential customers. Our approach to marketing to date has been to introduce ourselves to one new customer at a time and try to build their trust by delivering a high quality responsive service. The new merged organisation needs to review this marketing plan with some urgency and will probably need to bring in outside help to help it do this effectively.

### **6.1 Branding**

The Company has agreed a basic logo which needs to be developed further into a distinctive brand that we want people to identify with. A local company, Six Red Squares has been commissioned to help with this. They are young, enthusiastic, energetic and within our price range.

### **6.2 PR and Publicity**

This is an area we need to work on within the next year. We need to produce a leaflet, posters and newsletters to publicise our services and ensure the local press are aware of any successes. The Learning Town project will be an opportunity to make a bit of a splash in this respect.

### **6.3 On line presence**

SET is developing a new website which contains information about events, meetings, services, partners, governance, our people and finances. The trading company also has a website more geared to selling services than providing basic information. Both websites link to other useful sites relating to our partners. The Trust facilitates several network groups for school staff and each of these has an interactive on line community where they can share ideas, information and good practice.

## **Policies and procedures**

Policies and procedures are reviewed and updated on a regular basis.

Recruitment and selection policy  
disciplinary procedure  
appeal procedure  
grievance procedure  
equal opportunities policy statement and procedure  
retirement procedure  
holidays and holiday booking policy and procedure  
absence from work – payment, notification and certification  
payment when absent due to sickness or injury  
absence notification procedure  
certification and medical examinations  
frequent absence  
long term absences  
unauthorised absence  
absence from work – other reasons  
time off during working hours  
jury service  
public duties  
absence from work – family friendly  
time off for dependants  
parental leave  
flexible working  
maternity  
paternity leave  
adoption leave  
travel on company business  
computer, e-mail and internet policy  
health and safety policy statement  
safeguarding policy

<b>Overview</b>
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<b>Project</b>	<b>Funder/ Commissioner</b>	<b>Budget</b>	<b>Responsible to</b>	<b>Outcomes/outputs/targets</b>
<b>Developing, leading and managing the Business</b>				
Reserves				
CRB umbrella organisation	Trading (self financing)	Zero budget	Board of Trustees	
Employer engagement	SET	30k	Board of Trustees	Generate surplus Provide service to schools
Scollar Associates	Trading (self financing)	Zero budget	Scollar Associates	Generate surplus
Website and communications	SET		Board of Trustees	Minimise tax liability Internal and external communications effective
PR and branding	SET		Board of Trustees	Reputation high. Income generation meeting targets set
Alliances	SET		Board of Trustees	Profile high, partner of choice
New business	Associates / SET		Board of Trustees and Associates Board	250k turnover 100k surplus
Strategies	SET		Board of Trustees	Strategy clear and known and owned by all stakeholders
Governance	SET		Board of Trustees	Well run organisation
Quality	SET		Board of Trustees	PQASSO level 2
Statutory partnerships	SET		Board of Trustees	Partner of 1 <sup>st</sup> choice
Risk Management	SET		Board of Trustees	Risks managed well

<b>Project</b>	<b>Funder/ Commissioner</b>	<b>Budget</b>	<b>Responsible to</b>	<b>Outcomes/outputs/targets</b>
<b>Developing the Learning Community</b>				
VLE – Learning Platform	SET		Curriculum Steering Group	
Network Groups	SET		Board of Trustees	
Specialisms	SET		Board of Trustees	
Voice & Influence	SET		Social and Emotional Well Being	
Innovation	SET		Board of Trustees	
<b>Developing the Curriculum</b>				
ICT	SET		Curriculum Steering Group	
EAL	SET		Curriculum Steering Group	
Overarching project	SET		Curriculum Steering Group	
Challenge for All	SET		Board of Trustees	
Philosophy	SET		Board of Trustees	
Social & Emotional Well Being	SET		Curriculum Steering Group	

<b>Project</b>	<b>Funder/ Commissioner</b>	<b>Budget</b>	<b>Responsible to</b>	<b>Outcomes/outputs/targets</b>
International Dimension	SET		Curriculum Steering Group	
PML	SET		Curriculum Steering Group	
Outdoor Learning	SET		Curriculum Steering Group	
Assessment for Learning	SET		Curriculum Steering Group	
<b>Support for Learning</b>				
Aimhigher	Aimhigher Essex		Essex Aimhigher	
St Nicholas E2E	Nova Partnership		LSC	
Learning Mentors	SET		Challenge for All	
Nurture Units	SET		Challenge for All	
Primary M H W	SET		Challenge for All	
Belfairs counselling	SET		Challenge for All	
<b>Developing the Workforce</b>				
SAS	TDA		TDA / Curriculum Steering Group	
Bursaries	SET		Board of Trustees	

<b>Project</b>	<b>Funder/ Commissioner</b>	<b>Budget</b>	<b>Responsible to</b>	<b>Outcomes/outputs/targets</b>
SEC maths/reading	SET		Board of Trustees	
<b>Devolved to schools projects</b>				
	SET		Board of Trustees	

