



ROBERT OWEN ACADEMY

# An Innovative School Ahead of its Time

**The Story of a Free School Journey  
from Concept to Closure**



# An Innovative School Ahead of its Time

**The Story of a Free School Journey from Concept to Closure**



# Contents

*All the views and opinions expressed in this document are the personal views and opinions of the individual contributors. Facts, observations, opinions and memories have been combined to create this narrative of the lifecycle of the Robert Owen Academy.*

*All contributions to this document have been freely given without any charge, payment or expenses whatsoever. Such has been the support for and commitment to our precious and unique Academy.*

*Please note: whilst the school opened under the name of Robert Owen Vocational School, the name Robert Owen Academy has been used throughout this document, including extracts taken from the original bid.*



<b>ACKNOWLEDGEMENTS</b>	<b>6</b>
<b>FOREWORD</b>	<b>9</b>
<b>INTRODUCTION</b>	<b>10</b>
<b>CHAPTER 1:</b> The Drive For Vocational Education In The UK Since 1944	<b>12</b>
<b>CHAPTER 2:</b> The Co-operative Dimension	<b>17</b>
<b>CHAPTER 3:</b> From Concept To Reality	<b>23</b>
<b>CHAPTER 4:</b> The Development Year 2012 – 2013	<b>43</b>
<b>CHAPTER 5:</b> The Robert Owen Academy At Work 2013 – 2018	<b>52</b>
<b>CHAPTER 6:</b> Governance	<b>81</b>
<b>CHAPTER 7:</b> Final Summaries	<b>92</b>
<b>CHAPTER 8:</b> The Hard Lessons Learned	<b>98</b>
<b>CHAPTER 9:</b> If We Had A Time Machine...	<b>100</b>
<b>CHAPTER 10:</b> Reflections	<b>103</b>
<b>ABBREVIATIONS AND ACRONYMS</b>	<b>118</b>
<b>LIST OF REFERENCES</b>	<b>120</b>

# Acknowledgements

As a Trust, we acknowledge that this has been a *Magnum Opus* for us as a very small group of dedicated citizens, with a one-person office finalising the run down and closure of the Trust in spring 2019. The Robert Owen Academy (ROA) shut its doors to staff and students on 31st August 2018. However, we are adamant that it is our collective and professional responsibility to tell the story of the Academy as we see it, through a process of objective evaluation as we capture the development through the eyes and ears of many. We write this 'Acknowledgements' section just before Christmas 2018, as our last act before passing the whole document to proofreaders and then to our printers. As a co-operative we celebrate our Academy and we celebrate the untold voluntary work that has gone into putting this document together, which has been in the true spirit of the support that our Trustees, Governors, staff, parents and local businesses have given our Academy since its inception.

To single out individuals is often an invidious business, particularly in the case of our Academy, as so many have stuck with us through thick and thin, when it often felt as if we were with John Wayne on the Alamo. Our Vice Presidents deserve a specific mention for their ongoing support and, in particular, our MP, who has given us his support from the time of the writing of the proposal through to closure.

He has sat with us in meetings with civil servants in London and with the Academies Minister. He has written to the Secretary of State and has done all within his power to keep our morale from flagging and to fly the flag to keep the Academy open. Uniquely, among locally-based politicians, he saw the need for the Academy and the help and support it would provide to the Herefordshire family of schools and its students, together with its potential role in the regeneration of the Marches sub region. We also thank our Manchester-based medical consultants and their financial backer, who so wished to base a medical and nursing school within the Academy. They had national interest, and with local backing this would have become a reality.

We are grateful to the Principal of South Gloucester and Stroud College for his subsequent, unstinting efforts to bring the Academy into their Multi-Academy Trust (MAT) and allow it to evolve into a University Technical College (UTC) majoring in cyber security.

We acknowledge the partnership with United In The Community and the unselfish manner in which their trustees supported the transfer of the distance learning BTEC Diploma contract to the Academy, as well as the interest shown by football teams across the West Midlands to expand the membership. This would have

made Herefordshire a virtual centre for excellence training in football for the whole of the West Midlands.

The Trustees and Governors have worked tirelessly, without pay and, in many cases, quietly and anonymously, making personal donations to fund student projects. The Stakeholder Board has been at our side throughout and has instigated many detailed cross-curricular work based on real time projects as well as making key recommendations related to the direction of the Academy. Our staff have stuck with us and their commitment to remain with us and serve our students in the final two years, when the threat of closure was ever-present, often to their own personal detriment, is a testament to their total professionalism. Our loyal parents bought into the vision and maintained their support, seeing the difference that we were making to the lives of their children.

It is with a degree of irony that we now hear that the new Hereford-based University 'New Model in Technical Engineering' (NMITE), is set to move into our vacant Hereford City premises. It is also with a tinge of sadness that we listen to the ever-growing clamour from newly appointed education leaders and local 'movers and shakers' to fight our closure. We appreciate that the true potential of the Academy and the vision of the Academy pioneers are only now

beginning to sink in, with a collective sense of the scale of the loss to Herefordshire and the Marches sub region. However, we have done all we could, and we now wearily retreat from the battlefield for new warriors to take up the cause of 14-19 technical and vocational education. We thank our friends for being with us throughout. We have been blessed with your support and we will never forget those who stayed by our side in the darkest of days, when it seemed that the education world was totally against our innovative ideas and the belief in a better world for our students.

Thank you all.





# Foreword

By Dame Janet Trotter OBE DBE CVO



I am delighted to have been invited to write a forward to this evaluation of a brave and innovative venture with young people at its centre.

The Robert Owen Academy, named after the great social reformer, opened its doors to students on 1st September 2013. Its origins, however, go back much further to a desire to put education at the heart of regenerating the Marches and provide further opportunities for young people. The intention was to develop a co-operative, community-owned model of education, where educational and vocational areas of endeavour had parity of esteem and where co-operative values would dominate. Longer term, there were plans for Initial Teacher Education to be re-developed on the Marches, and for teachers and resources to be shared with other local educational establishments.

The plans were detailed: a redundant school building in Hereford was secured and upgraded and teachers and pupils were recruited. All was set fair, it was hoped, for the future.

The evaluation sets out the story of the rise and fall of this project. The reasons for the closure of the Academy after high expectations are complex; some are strategic, some administrative and some reflect the difficulty of putting the founding vision into practice in an increasingly competitive education market place.

I hope this evaluation will be read carefully and lessons learned by other communities wishing to embark on brave experiments designed to support the many young people who are underachieving in our current education system.



# Introduction

The final decision, taken on 8th March 2018 by the Parliamentary Under-Secretary of State for the School System, to close the Robert Owen Academy on 31st August 2018 marks yet another landmark in the long struggle to develop vocational education in England. The letter indicated that the decision was driven by reasons of finance, but during the six years of uncertainty that central Government has created around the Academy, the reasons given for potential closure have shifted from poor Ofsted outcomes to a shortfall in recruiting, to opposition from the Local Authority, to financial difficulties. The Trust remains uncertain as to the main driving force for closure, which has hung over our collective heads like the sword of Damocles since approval in July 2012. However, the view is emerging that either the Regional Schools Commissioner (RSC) or the Department for Education (DfE), or a combination thereof, encouraged by the Herefordshire Local Authority, want to reduce the capacity in Herefordshire and have alighted upon the Robert Owen Academy as the convenient sacrifice.

Quite clearly, the motivation has shifted and changed over time and few of us have been able to detect any clarity to the reasoning. Without exception, it is agreed outside the magic circle of regional and national decision makers that those with the power wilfully refuse to understand what the Academy did and tried to do differently. When confronted, the power brokers return to their concept of a ‘bog-

standard comprehensive school’, which the Robert Owen Academy has never pretended to be. In short, we contend that although the Secretary of State has every right to withdraw our funding (providing legal process is followed), the decision making about our future has been poor and badly managed.

We believe that the Free Schools Initiative, as originally conceived, was a brave attempt to bring about change in an English education system that has historically been highly resistant to change. The brave words and vision of the 1944 Education Act and subsequent engines for change have never brought about the required improvements that our young people desperately need. One size fits all never has and never will serve the highly individualistic needs of our students. When, in the autumn of 2011 we set out to develop a consensus for change in the Marches sub region, which we hoped would lead to a firm 14-19 vocational education proposal, we listened to employer after employer who told us quite clearly that the school leaving product was not fit for purpose. In short, they needed the foundations for life, work and further learning, which are built out of knowledge, skills and experiences. The pioneers of the drive for the Academy knew that there were some things which couldn’t be changed in the short term and which would hold us back:

- The National Curriculum and the changes planned by the Secretary of State.

- The national fixation with examinations at 16 – namely GCSE and, increasingly, A level.
- The obsession in schools with meeting examination targets within the context of Ofsted criteria.
- The reluctance of head teachers to transfer or share students because of the impact of formula funding.
- The rapid growth in the number of students with complex needs, who were being gently steered out of many high schools.
- The centrality of the end of Key Stage 3 as a decision-making point in our young people’s lives, which should lead to opportunities to combine academic and vocational qualifications and meaningful work-based options within programmes tailored to each student’s aptitudes, abilities and preferences.
- The implicit academic elitism in our English education system which creates, by intent, an anti-vocational education society.
- The parity of esteem issue is one that any emerging 14-19 vocational academy would have to tackle head-on.

So, at one level we have palpably failed because the Secretary of State, through the Parliamentary Under-Secretary of State for the School System, says so. However, if we as a country are to move on and face the challenges of a post-Brexit society, set in the context of a rapidly globalising world, where technology will continue to transform our lives, we must learn the lessons from the Robert Owen

Academy. The external challenges will not go away, in fact, all predictions suggest that they will accelerate with devastating impacts on our country and our people. Those of us involved in the Robert Owen Academy, and of grey hair and advanced years, had expected a detailed evaluation of the Free Schools Project, just as we have approached virtually every education initiative since 1944 but, sadly, nothing has been forthcoming. It is almost as if the clutch of initiatives such as Free Schools, Studio Schools and UTCs are seen as a collective failure in the depths of Westminster, to be buried hastily and without ceremony.

As a result, the Robert Owen Academies Trust has decided that it is our collective responsibility to produce an evaluation of what we did, what we tried to do, what worked, what failed, what pressures we were under and, in so doing, celebrate the changes we have made to the lives of over 300 students in our innovative school, which was ahead of its time.

We hope that you enjoy the read and, hopefully, learn from our lessons.



# Chapter 1:

## The Drive for Vocational Education in the UK Since 1944

### Summary

*This section outlines how the history of education in the UK led to the need for a vocational school such as the Robert Owen Academy. It tracks education past the Education Act of 1944, through the TVEI Pilot Programme in 1983 to the introduction of the National Curriculum in 1988. From this, the historical forces and influences that shaped the eventual idea for the Robert Owen Academies Trust (ROAT) will become clear. It will also show what lessons had already been learned regarding vocational education, as well as highlighting attitudes, which had already been shaped.*

As the nineteenth century drew to a close, a series of Acts of Parliament required children to attend school and provided state funding for education up to the age of 13. For many families, 13 became the school leaving age because few parents had the means to pay for children to continue beyond this point. The 1902 Education Act established Local Education Authorities and gave them the right to establish, maintain and fund secondary schools. The 1904 Secondary Regulations determined a secondary curriculum based largely on the grammar school and public school curriculum developed by Thomas Arnold *et al* during the nineteenth century. The school leaving age was raised to 14 after World War I. By the start of World War II, relatively little progress had been made and in 1940-41 the Educational Reconstruction Committee of the Board of Education revisited the key issues. The debates within this Committee found shape and form in the 1944 Education Act, notably:

- That transfer to secondary school at 13+ would take too long to achieve and that changing the starting age of grammar schools to 11 would settle the matter.
- Allocation of children to different types of secondary school would be the outcome of batteries of tests to establish the academic potential of all 11-year olds.
- Thus, the eleven-plus tests allocated students to either grammar, technical or secondary modern schools after the 1944 Education Act or 'Butler Act'.

Selective technical schools struggled to establish themselves. By 1955, R.A. Butler identified that there were too few of these schools, with too many of them hidden away in the corners of technical colleges, consequently failing to achieve proper recognition and support. The parity of esteem die was irrevocably cast, with parents wanting their child to go to the grammar school and not the vocational

school associated with dirty overalls and low status jobs. With the advent of the National Curriculum in 1988, many local authorities abandoned three-tier structures, primarily to align their structures with the key stages.

In the midst of all of this we must not ignore the enormous influence of universities and examinations taken at age 16. The Trust considers that we have lost sight of the need to find and support the talents and ambitions of each young person and, instead, we focus relentlessly on a nationally set GCSE standard for measurement of success. Schools, in our experience, start to track children's progress towards GCSEs from as early as Year 7. The whole system is geared to 'warehouse' our young people into categories that define their eventual destinations. We have, yet again, turned our backs on practical, technical and vocational education, a mistake we have repeated as a result of relentless myopia, for well over a century.

The Technical and Vocational Education Initiative Pilot (TVEI) was launched nationally, through the Department of Employment in November 1982, with Herefordshire as one of the first of ten national pilot areas. As the name suggests, the main purpose of TVEI was to promote technical and vocational education within England and Wales and later Scotland.

The criteria, as set out in the TVEI operating manual from 1983, were unequivocal and can be summarised that vocational education was to be interpreted as education whereby the students were to acquire generic or specific skills with a view to employment. A major assumption behind the initiative was that expansion of technical and vocational education would eventually lead to improved economic growth and greater prosperity. The response of the educational establishment was



### Teacher Training Returns to Hereford

mixed, with some fearing a narrow and divisive vocationalism and others, more optimistically, seeing it as a catalyst that would stimulate a vigorous and imaginative reappraisal of the curriculum and of the educational purposes which it should serve.

In Herefordshire, a Technical and Vocational Education (TVE) Centre was set up as a 14-19 base in Hereford city centre on the site of the former Hereford High School for Boys. Ten high schools and four local colleges participated in the five-year project. The project allowed each participating high school to select an all-ability cohort of students to work on a shared curriculum delivery with the TVE Centre, which effectively became a technical and vocational school with an integrated curriculum and teacher development centre.





Official Opening of  
Marches Consortium

Top Photo in order LtoR:  
Chair of Governors,  
College of Agriculture,  
Colin Shepard MP,  
Craig Mayo, Mac Hood,  
Teresa Thomas,  
Ann Widdecombe,  
David Whitcombe



We know that the Department, at the end of the project in 1988, wanted the Herefordshire model to be rolled out nationally, but this was defeated by the Treasury.

The TVEI Extension Programme began nationally in 1988 and was rolled out in Hereford and Worcester in September 1989, involving all 14-19 establishments; it was organised in two phases. In Herefordshire, this meant all high schools and not just the initial TVEI Pilot pioneers. This was seen as an opportunity to continue supporting schools and colleges in their efforts to improve the quality of education. In reality, it became little more than an additional funding stream to deliver the National Curriculum with some limited initiatives, such as the piloting of the Technological Baccalaureate in Redditch high schools with City and Guilds and the Institute of Education at London University. There was a detailed evaluation undertaken at the end of the project, which highlighted the key areas of TVEI influence as:

- collaboration
- cross-curricular initiatives
- entitlement
- equal opportunities
- European dimension
- framework for development
- information technology skills
- progression
- recording achievement
- special education
- teaching, learning and evaluation
- training and development
- work experience.

Despite the positive findings of the pilot and its extension, vocational education remained in the siding and the parity of esteem issue was unchanged. Interestingly, out of the evaluation of the Hereford and Worcester TVEI Extension Programme emerged the view of many

participating colleagues that the net benefits of the TVEI programme were substantial, both in terms of increasing professionalism and developing understanding of educational processes. As always in education, not enough is known or understood about change processes. Implementation is, in many ways, an uncharted route and energies can easily be dissipated with trivialities and off-field challenges and irrelevant ideas. The evaluation concluded that local agencies continue to promote an appropriate climate, which both supports and sustains formative evaluation and change processes. One approach to this, which the report shows, is through consortia initiatives.

Prior to the TVEI Extension in Hereford and Worcester and, more specifically, in Herefordshire, there had been considerable co-operative working between schools and colleges with a generally inspired group of senior leaders. It was the intent of colleagues within the TVEI Extension to build upon existing relationships and to set up structures, which took collaboration to new heights. The TVEI Extension in Hereford and Worcester was subsequently organised into six consortia on a geographical basis of which the ancient County of Herefordshire formed one consortium. In general, schools and colleges welcomed the consortium approach and colleagues soon began to explore potential support structures and funding mechanisms, which could sustain curriculum innovation and professional development once the national funding stream finished. There was



Where it all started 1993 photo: Chris Morgan

a genuine belief that such structures had the potential to meet the wider educational and vocational needs of young people. In short, vocational education would be created through co-operation and sharing.

**“I’ve 20 years of experience as a TA in a variety of schools, both outstanding and struggling. Working with struggling children (struggling for a variety of reasons: health, background, SEN) there is definitely a place for schools like the ROA, where vocational training is supported by academic learning.”**

Melissa Davies, Robert Owen  
Academy Member of Staff

In 1991, the Training and Enterprise Council (TEC) offered Herefordshire secondary headteachers and college principals fully funded access to the Coopers and Lybrand consultancy, to explore what sort of co-operative consortium structure might work for them in the future (beyond the TVEI Extension). This consultancy proved to be of immense value and so the recommendation of Coopers and Lybrand that an Industrial and

Provident Society (IPS) be formed (with all schools and colleges as £1 shareholders) was agreed at a formal meeting in January 1992. The Marches Consortium was formed with an



agreed organisational and legal structure, which ensured autonomy for the schools and colleges as well as the creation of a body that could attract external funding for specific projects.

An exceptional group of Herefordshire senior leaders had put self-interest to one side in the global interests of all Herefordshire 11-18 students, with the clear vision that technical and vocational education would be seen, through their collective efforts, to be a full partner alongside academic education.

As we arrive in development terms at 2018, it is difficult for current headteachers and college principals to think outside the academic straitjacket, which is imposed by the Department for Education, policed by Ofsted, encouraged by examination boards (with their commercial interests to serve), supported by the university sector (with a drive to recruit the brightest and best students) and driven by parents who aspire to the Gold Standard of A\* GCSE grades followed by A levels. Local Authorities have long since given up the challenge of developing a fit for purpose local education system that offers genuine choice for all students. Thus, existing 11-16 and 11-18 comprehensive schools and academies will not find it easy to provide a full range of educational experience from traditional academic study to effective technical and vocational education, to the performing and creative arts and hence to vocational careers, pointing to career pathways. With great respect, two hours of wet trades on a Friday afternoon in a distant annexe, with difficult children is not what vocational education, in its full breadth, is about. At best, in a few schools, students are given a taste of certain vocational activities but their appetite for in-depth, focused, high-quality learning linked to their particular interests simply will not be accommodated because of the restrictions of time, dominant school culture, specific learning environments and lack

of skilled staff who have been there and done it in vocational employment.

Kenneth Baker, a former Secretary of State for Education, in his book '14-18: A New Vision for Secondary Education' (Baker, 2013) sets out what he believes are the four, distinct, 14-18 pathways that we should now be moving towards:

- A technical pathway with a focus on engineering and ICT.
- A liberal arts pathway built around academic subjects.
- A sports and creative arts pathway, embracing a wide range of sports and arts ranging from theatre, music and dance to fine art and a wide range of hand crafts such as pottery, sculpture and cabinetmaking.
- A career pathway, similar to that of the German and Austrian systems. This pathway would combine basic academic subjects with work-based apprenticeships and off-the-job education and training.

As readers progress through our account of *An Innovative School Ahead of its Time*, we are sure that they will see this chapter as key in setting the context in which the exceptional Robert Owen Academy was born and crafted by our pioneers.

## Chapter 2:

# The Co-operative Dimension

### Summary

*This section gives a brief history of the forming of the Marches Consortium Co-operative, the ideals of the founder members and their enthusiasm and belief in a vocational education path. It notes the achievements of the co-operative, as well as the lessons learned. It marks the run up to the idea of forming a co-operative vocational school, which would eventually come to be the Robert Owen Academy.*

In January 1992, the pioneer Herefordshire secondary school headteachers and college principals unanimously accepted the Coopers and Lybrand recommendations to form a co-operative within the legal framework of an Industrial and Provident Society (IPS), and the mould was well and truly broken. They were ably supported by a forward-looking Training and Enterprise Council (TEC) working in harmony with a visionary Hereford and Worcester County Council Local Education Authority. The pioneer headteachers and principals were, themselves, a unique group. They had lived the TVEI experience since 1983, they could see the way national education provision was going and they had very real concerns about service delivery in one of the most rural wildernesses in England. The essential components were all in place to facilitate this ground-breaking move. It was a national first as nowhere else, in the length and breadth of the United Kingdom, had such a radical experiment been undertaken. In later years others would follow this route, but none in such a radical and total fashion. These Herefordshire senior leaders were committed to each other and their students in a way never seen since – they were, in their eyes,

a genuine collective with legal status outside of other statutory boundaries. The first Chair of the Marches Consortium Co-operative, said at the first meeting of the Board, "When I go to London to speak for Herefordshire in the pursuit of funds, I can truly say that I represent a significant group of high schools and colleges within one legal entity."

Of course, there were issues to be resolved going forward and these brave pioneers had the confidence in each other to know that they would be addressed equitably and equally as they arose. Amongst these issues were questions about the rights and roles of individual schools and colleges and the communities that they served. However, everyone understood in that unwritten bond of co-operative loyalty and trust that there are no absolute and final answers, only challenging and potentially acrimonious discussions. There would be undercurrents in all the debates because that is the nature of politics.

Those with a background in the co-operative movement knew that cooperation was important because it represented an institutional response to the tensions created

by the differing, and often competing appeals of individual schools and colleges and of groups within each establishment. Of course, one of the most important and distinctive characteristics of the co-operative movement is the way it attacks excessive and exploitative individualism and how it seeks to find ways to accommodate the diversity of human experience. For the Marches Consortium, going forward and understanding the relationships between cooperation, community and individuality was not simple. The forces leading to the creation of the Marches Consortium provide part of the explanation because they created the original frameworks.

All members of the Marches Consortium held a £1 share, which gave each member, regardless of size, an equal vote at general meetings. Later in the development it was often quoted that the Open University and the University of Birmingham, as shareholders, both had the same number of votes as the two-teacher primary school out on the Welsh Border.

The purpose of this chapter is not to set out a detailed case study of the unique development of the Marches Consortium as this could be produced as a separate paper for those who may have an interest in such matters. It is enough to record that this move in 1992, in rural Herefordshire, was of a ground-breaking nature, which others have imperfectly tried to copy elsewhere. Although the Consortium has existed as a co-operative for some 26 years, it is now in a phase where it may close. The impending and inevitable demise is simply because newly appointed headteachers and

principals, local authority officers, school and college governors and elected members did not see the need to work mutually, for the benefit of the majority. This growth of individualism has proved to be destructive and, in a sense, has merely reflected the growth of neo liberalism in wider society. This growth of what is effectively narcissism has promoted a 'me and my organisation above all else' attitude and, sadly, is promoting false senses of importance, weak listening skills, difficulties in working with others and an over-indulged preoccupation with status, image and organisational image. It all fits poorly

in a co-operative context, and later in this evaluation of the Robert Owen Academy, it will be shown that it became a powerful force for closure.

In adopting the values and principles of the International Co-operative Alliance, the Marches Consortium pioneers regarded them as guidelines to enhance their democratic practice, their engagement with other members, their commitment to education and training, their deepening involvement with other co-operatives and their absolute

involvement with the various communities they served. Our pioneers knew that there could be no expectation of perfection in these matters, only a regular and wholehearted effort to steadily improve performance. It was implicitly understood that when thought of as an entity, rather than as a number of discrete statements, the principles were in place to balance the claims of community and individuality. So, members were central, but they had a dual role to make sure that their organisations functioned in keeping with the values upon which co-operatives are based.

**Although the Consortium has existed as a co-operative for some 26 years, it is now in a phase where it may close. The impending and inevitable demise is simply because newly appointed headteachers and principals, local authority officers, school and college governors and elected members did not see the need to work mutually, for the benefit of the majority.**

Once the Marches Consortium was launched the initial building blocks were quickly put in place and can be summarised as follows:

- A Board of Directors drawn from local members.
- A Consortium Officer and Clerk appointed to work out of the first Consortium Office based in the College of Agriculture, which later moved to a shared location with Herefordshire Council.
- A funding principle established that there would be no annual membership fee other than a one-off, £1 share purchase and that running costs would not exceed 20% of income.
- A Business Plan for the year ahead to be agreed at Annual General and Extraordinary General Meetings of members and to have a triple focus of education, training and re-generation – both social and economic.
- Income to be raised through grants and bidding for local, regional, national and international projects, which would involve members by choice.
- In the first 15 years, income for members rose from £10,000 pa to £7m per annum.
- Over time, the membership base increased to include primary schools, local authorities, individuals and institutes of higher education, local businesses, and other co-operatives.

The range of projects developed was impressive and certainly enhanced the lives of many teachers, lecturers, students and communities as well as bringing in much needed and significant external funding. A sample included:

- The delegated Training and Enterprise Council's education delivery targets for Herefordshire.
- Running a Headteachers into Industry placement programme.
- Designing a log book for Herefordshire Year 11 work experience students.
- Developing Recording of Competence,

Knowledge, Education and Training (ROCKET) as an electronic assessment and recording of achievement tool for Herefordshire secondary school and college Further Education students.

- Picking up the Leominster Single Regeneration Bid (SRB) programme (*Leominster Back from the Brink*) at the end of the SRB funding, when the main partners were not prepared to pick up the provision and expanding and running the Leominster Education Resource Centre as a Herefordshire training base.
- Creating and running for over five years the radical VETO Project for Herefordshire Year 10 and Year 11 disaffected secondary school students. This project eventually evolved into the multi-million-pound European-funded Alternative Pathways for Success (ALPS) Project.
- Master Class in service management training at Master's level for senior leaders and middle managers with the Engineering Faculty of the University of Central England (now Birmingham City University).
- Running WISE (Women into Science and Engineering) course for secondary school level female students in Herefordshire.
- Developing and running an Access to Higher Education Programme with the Engineering Faculty at the University of Central England for Herefordshire secondary school students, which used records of achievement as the means of achieving entry qualifications on an agreed scale.
- Securing a bid to the Higher Education Funding Council to manage and run a Rural Outreach Programme in Herefordshire, Shropshire, Worcestershire and Staffordshire in partnership with, initially, the Open University, the University of Wolverhampton and the University of Birmingham. This programme sought to help students from the age of 18 years onwards to follow



**“ Helping young people who, for a variety of reasons, have unfulfilled potential or might opt out of education, is a hugely laudable endeavour. Right across the country, in both urban and rural areas, there are those who do not benefit from the mainstream education system. Herefordshire is a case in point. Despite its natural beauty, there are significant pockets of rural deprivation. Twelve areas of Herefordshire are among the 25% most deprived in England. It is to be hoped that the authorities do not discount the contribution made by the Robert Owen Academy in its comparatively short life – or indeed ignore the continuing need.**

**The ROA recognised from the research carried out with employers, that there was a need to develop a curriculum that incorporated opportunity for learners to obtain and hone their employability skills. The ROA managed this through a mix of vocational and academic subjects, which also applied knowledge learnt. While undertaking the planting of a flower bed it was necessary to be able to peg out the right size and shape for the bed and calculate the correct amount of seed, then write up their observations and learning points. When making bird boxes, designs were made, plans were drawn up and measurements made to make sure it would all fit together once assembled. During these sessions, learners were encouraged to discuss their ideas with each other and learn from one another, thus developing their communication and negotiation skills. The teachers we engaged were brilliant, taking on board the change in teaching style they saw, very quickly, the positive change in the behaviours of the learners.**

**In retrospect, if I were starting this project from scratch today, I would use more of our meagre budget on marketing and advertising in an effort to convince more people more quickly. Any change can be a slow process, we needed to engage more secondary headteachers early on as well as convince the Education Department of our local Council that there was nothing to fear and everything to gain from our bold curriculum.**

**The facilities should have matched those in other places which engage in technical education, but they did not, so the environment was difficult to market to new and different sorts of young learners.”**

*Robert Owen Academy Member of Staff*

the OU Access to Higher Education Programme to gain access to undergraduate programmes without more formal ‘A’ level qualifications.

- Initial Teacher Education in partnership with the University of Gloucestershire through a School Centred Initial Teacher Training (SCITT) Project, which eventually trained 3,700 postgraduate students to PGCE level to work in all age phases of statutory education.
- Running the national pilot programme for Vocational PGCE qualifications in Engineering, Applied Science, Leisure and Tourism and Applied ICT.
- Securing a national contract to run Return to Teaching Programmes for qualified teachers who had been out of the profession for a number of years.
- Holding the national contract for the undergraduate Student Associates Scheme (SAS), which targeted current Herefordshire undergraduate students and offered funded school and college placements, to encourage them, post-graduation, to choose teaching as a career.
- Offering, through a nationally funded programme, potential applicants to Initial

Teacher Education (ITE) postgraduate programmes subject knowledge booster courses to firm up subject knowledge. Many providers of ITE recommended successful applicants on their own programmes to attend one of the Marches Consortium courses.

- Establishing a procurement scheme for local schools and colleges initially in partnership with the Co-operative Group.
- Resourcing and establishing a postgraduate training centre at the Queen Elizabeth High School site in Bromyard.
- Running in Herefordshire a highly successful Diploma in Management Studies programme in partnership with the Co-operative College for teachers, third sector workers, local business and statutory bodies. A progression route to an MBA qualification route was mapped out from this.

A conservative estimate indicates that, in the first 20 years of its life, the Marches Consortium Co-operative secured in excess of £40m of new funding for Herefordshire and the Marches sub region. A truly remarkable feat and one which provided the rural sub region with a much-

*Class 1, Day 1 September 2013, Holme Lacy temporary site*





needed boost against sometimes significant opposition from other external organisations and, surprisingly, some members and partners. In order to cope with such exponential growth, the Directors, the small number of central staff and members had to evolve procedures, systems and business plans almost ‘on the hoof’. There were times when matters may not have been managed as well as they might have been, but constant evaluation meant that we learned the lessons the hard way. We had no national models to emulate or learn from, and this became obvious as increasing numbers of other groups travelled to Herefordshire to learn at our feet.

It was against this successful co-operative background that, in 2011, the early moves were made to put together a proposal for a Co-operative Vocational School; a school that would be owned by its members in the best traditions of the Marches Consortium and which would have, as its primary purpose, their wellbeing. In essence, a school which would reflect the power of the old co-operative logo.

### “Each for All and All for Each”

Closing this chapter, it will perhaps be useful to list the lessons, some painful, some not formally framed, and some discussed with passion when members met, that our early Marches Consortium Pioneers had learned. They can probably be more easily understood in terms of our movement’s underlying values, which expect co-operators from different cultures,

traditions and starting points to:

- Accept responsibility for ourselves and work with others to do the same.
- Believe in the power of mutual self-help – particularly in the areas of education, training and regeneration.
- Trust democracy and strive to apply it in all its wider applications, however painful.
- Seek genuine equality in relationships with other co-operators and within our own co-operative. To believe genuinely that the two-teacher primary school and the multi-million pound university are truly equal in terms of membership rights and responsibilities.
- Seek equity in what we do individually and collectively.
- Collaborate with like-minded people and organisations and encourage other co-operatives to do the same.
- Recognise the many and painful challenges resulting from being honest with each other but coming to see this as a strength.
- Strive for openness and transparency in relating with others externally and with members internally, with no secret deals and under-the-counter trading.
- Encourage our co-operative and others to build more sustainable, socially responsible and caring communities, which recognise the interdependence of groups and members.
- Understand that we all grow in cooperation and wither on the vine of naked competitiveness.

## Chapter 3: From Concept to Reality

### Summary

*This chapter sets out the vision which the Trustees had for the new Robert Owen Academy. It summarises information contained in the original bid. It can be seen that the vision was for a truly co-operative vocational school, which was carefully calculated to fulfil a need in Herefordshire and its surrounding counties for a curriculum designed to fill gaps in the job market. The bid took into account the opinions and needs of local businesses, as well as teachers and leaders from the educational community. It is proposed that the needs, which the Robert Owen Academy was designed to fulfil, were never truly understood at either national, regional or local levels. In brief, the Robert Owen Academy was designed to:*

- Offer a possible solution to the parity of esteem divide between the academic and the vocational areas of knowledge and study through an integrated curriculum.
- Present a co-operative, community-owned model for our school where ownership rested with all, including the other schools and colleges.
- Be a centre for Initial Teacher Education.
- Be a teachers’ centre for excellence and innovation in teaching and learning.
- Share teachers with other schools.
- Share students with other schools.
- Bring increased resourcing to other schools as part of a co-operative network.
- Eventually, be part of a Multi-Academy Trust that would bring added-value to our Welsh Border communities.
- Provide an incubator unit to foster self-employment amongst school leavers – both individually and in co-operative groups.
- Promote economic and social regeneration across the Marches sub region.

### Background

When the Secretary of State for the Coalition Government announced, in 2010, the creation of Free Schools and subsequently invited proposals from groups with innovative and creative ideas, the seeds were sown for a new provision among some of the co-operators with a history of working within the Marches Consortium and the subsequent co-operatives. The stalemate that had followed the end of both the national TVEI Pilot and Extension Projects, together with the drying up of more local and

regional funding for projects such as Alternative Learning Pathways to Success (ALPS), linked to a clear change in local authority culture, worried many educational professionals. There had developed an inward-looking attitude, one favouring retrenchment and survival set in a context of a central government push to elitist academic success provision. This had led directly to a deep sense of community frustration that many groups of 14-19-year-old students were now receiving a bad deal, which would result in the accumulation of problems for society into the future. Their choices had become more

**“Having been involved with the project from the outset, it felt like fighting one long string of losing battles. Once the school opened, I naively thought that the Local Authority would have accepted us, and the vital support we provided for some of the county’s most vulnerable young people. How wrong could I have been?”**

*Robert Owen Academy Member of Staff*

restricted, their disaffection with the academic system had become heightened and levels of achievement were falling.

The number of students not in education, employment or training in Herefordshire (NEET) was at a worryingly high level when compared with the rest of the West Midlands and, at the time, anecdotal evidence indicated high levels of non-attendance, disaffection and alienation linked to complex social, learning and behavioural needs. Even in those early days, the stories of significant numbers of young people outside the system and sleeping under hedges, in barns and shop doorways had begun to stir the consciences of those who cared.

The need for this form of highly specialised provision in the designated area had been proven since 1983 through the TVEI Pilot Project in Herefordshire with a dedicated Technical and

Vocational 14-19 Centre, the TVEI Extension Project with its innovative work on 14-19 curriculum progression and continuity, the Robert Owen Group’s Vocational, Training and Educational Opportunities (VETO) Project and the Robert Owen Group’s European-funded ALPS Project. Since the ALPS project ended in 2009 there had been no dedicated provision for this type of vocational learning, which was evidenced by a corresponding increase in the number of young people not in Education, Employment or Training (NEET) as shown in Table 1.

**The State of Herefordshire 2011 Report**

Additionally, the State of Herefordshire 2011 Report identified that employers found many young people to be poorly prepared for entering employment and that skilled trade

vacancies were hard to fill. The following areas were specifically identified as threats and challenges to the local economy:

- Skilled trade occupations accounted for a relatively high proportion of those in employment; employers found skilled trade vacancies hard to fill and skilled trade vacancies accounted for the highest proportion of skill shortage vacancies.
- Employers reported that there were skills gaps in managerial and skilled trade occupations and that some young people were poorly prepared for work.
- There was still demand for migrant labour in Herefordshire that employers reported would be difficult to obtain from other sources.
- Herefordshire was losing approximately 5% of its working-age population, who travelled to work outside the county.

Unemployment was higher than prior to the recession, particularly amongst people under the age of 25 and work-based earnings were low when compared both regionally and nationally, with the gap increasing. This gap in earnings was due to the dominance of low-technology manufacturing and low-value sectors of employment, such as agriculture and retailing, in the area.

The gap in attainment between the best and worst performing areas at GSCE was still increasing, and in 2010 there were more areas listed amongst the most deprived in England in terms of achievement in education and skills. Therefore, in one of the most rural areas of England there was a critical shortage of specialised pre-vocational and vocational education and training for the 14-19+ age group. The aim of the Robert Owen Academy was to motivate and educate this growing population to realise the benefits of vocational training, work (including self-employment) and

living and contributing to their communities as integrated and fully functioning citizens. The 14-19+ Robert Owen Academy could tackle head-on the challenge of maximising the number of young people in education and training whilst raising the whole profile of vocational education and training across the full ability range. It was to have as its core mission the challenge of the ‘parity of esteem’ between the academic and the vocational curricula.

**Key Concept for a New Educational Environment**

**An extract taken from the Bid Submission**

*To provide a flexible and balanced programme of general and vocational education in the 14-19+ age range for young people from a diverse range of rural backgrounds, which will facilitate their broad intellectual, cultural and personal development as well as presenting them with an opportunity for effective vocational preparation for work (including self-employment) and further work-based training.*

At the start of the academic year of 2011-2012, the concept of a 14-19 co-operative vocational education school in Herefordshire to serve the Marches sub region, which would have both dedicated cohorts of students and share students and staff with partner high schools, colleges, training providers and community groups was in a form to consult more widely. The initial concept was taken through directors’ meetings of the various co-operatives; it was shared with the autumn round of Annual General Meetings and, most importantly, it was taken out on the road to Members’ Council meetings in schools across the Marches Consortium footprint. That the concept had a good airing is beyond dispute and the ideas that flowed were challenging, creative and seminal in shaping the final proposal. There were now

Table 1

16 to 18 year olds not in education, employment or training (NEET)			
	2008	2009	2010
	%	%	%
Herefordshire, County of	5.8	5.9	6.8
West Midlands	7.0	6.6	6.2
Shropshire	5.2	4.7	5.2
Source: Connexions/The Department for Education, The Client Case Load Information System (CCIS)/Labour Force Survey (LFS)			

very few voices against submitting a proposal but the development that most of us missed was that the new generation of headteachers and Local Authority officers were not hooked on co-operative working and were failing to attend meetings to a significant degree.

The founding headteachers were eager for meetings to be held in their schools and hardly missed a meeting. The culture had changed almost overnight and we had become reliant on those teachers attending to carry the messages back to senior management, but culture changes in schools seemed to indicate that this sort of information was of low priority. In the round of Members' Councils consultations there was pressure from areas in the more urban West Midlands to lift the proposal out of Herefordshire and base it in their own homelands. To have missed this opportunity will be an important outcome of this evaluation.

The feedback from the community consultations indicated that the proposal must include (in no particular order of importance):

- A 14-19 co-operation vocational education school which was non-selective.
- A base for in-service training with teachers from schools seconded to work with students as a part of this.
- Two cohorts of students in each of Years 10, 11, 12 and 13 – one of which was dedicated to and one of which was shared with partner schools, colleges and training providers.
- The ability for funding to flow from the vocational school to partner schools to resource participation.
- Work with accreditation bodies to develop appropriate qualifications.
- Linking with a number of Higher Education partner institutions.
- Involvement of primary schools with outreach workers from the vocational school.

- Community ownership of the vocational school, which would reflect the co-operative ethos, and which would create a form of Stakeholder Board. Every care was to be taken to minimise the impact on other schools and colleges.
- A 14-16 route for all to assist with post-16 choices.
- A post-16 route into apprenticeships with European links.
- Individualised learning with an integration of academic and vocational work recorded within suitably developed records of achievement.
- Protracted, vocational employer-based placements and residential opportunities, all of which would be integrated, assessed and recorded within the main curriculum.

It was clear that this school was very much wanted, was needed and a wide range of education and training professionals, together with local employers, had a very clear view of what it should provide. For once, it seemed to the core team that the door was wide open, and the sole task remained to put together a suitable proposal to the Secretary of State.

### Moving Concept into Practice – The Bid

The writing team started work in December 2011 to complete a detailed, 129-page proposal to the Secretary of State to run a 14-19 vocational school based in Herefordshire but serving the rural Marches sub region either side of Offa's Dyke. Seldom, in the experience of the grey beards, had a concept received such widespread support in an area of high rurality and characterised by a conservative view of the world.

In their proposal, the core team set out the

following vision for the Robert Owen Academy.

It would provide a flexible and balanced programme of general and vocational education for young people from a diverse range of rural backgrounds in the 14-19+ age range. This would facilitate their broad intellectual, cultural and personal development as well as presenting them with an opportunity for effective vocational preparation for work (including self-employment) and further work-based training. The vision was to have cohorts of young people, at first within the Robert Owen Academy but ultimately nationally, achieving fulfilled personal and professional lives, enjoying satisfying work and careers. This vision was to be realised by providing the students with a whole curriculum package encompassing both the academic and vocational competence/skills-based disciplines. This would be tailored to meet the needs of the individual student through pre-course counselling, formative assessment and tutoring, which would be reflected in the Vocational Baccalaureate (Voc.Bac), each student's Record of Personal Achievement. There was to be a gradual movement from the pre-vocational competencies to specifically allied vocational skills, all within the unified curriculum.

The integration and coherence of each student's programme, therefore, was to be achieved by the embedding of the Core Skills Curriculum and the core skills across and within every aspect of the academic and vocational work.

This would deliver a seamless course of study, modular in style, characterised by a process-led approach, which would facilitate progression.

The specifically work-related skills were to be achieved alongside the general skills, as the major objective was to achieve the employability of every student,

emphasising, therefore, the crucial role of the core and the generic skills in this bid. The driving force of the school would be to exploit all opportunities to develop fully the intellectual, social, creative and expressive abilities of all the students. Through the school's curriculum programme, it was to be our mission to ensure that:

- Our students become people who could do things as well as know about them (i.e. rounded people with skills as well as knowledge).
- We helped our students to choose and prepare for the most appropriate for them qualifications, experiences and work (including self-employment) routes.
- We helped them change or refine their options without having to go back to square one.
- We provided a balanced curriculum for a wide range of abilities and behaviours.

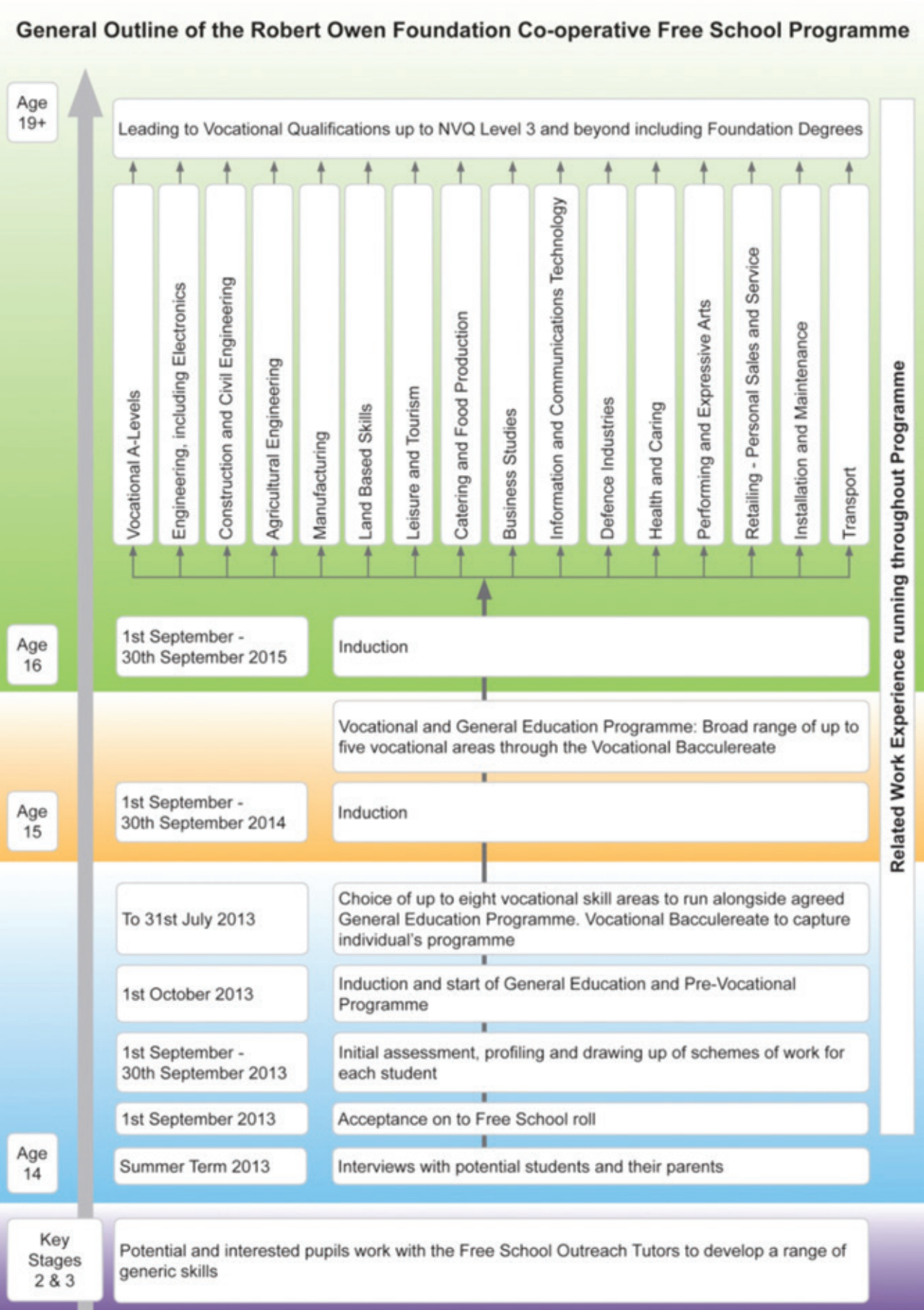
The 14-16 Programme was to provide students with broad vocational experiences. The 16-19 Programme was to build on this experience; it would be refined and personalised to suit each student's needs.

***“At the end of the day, the ROA fought for those students and families who had been let down by the system; for those who were unable to fight for themselves. It saddens me how much hostility the ROA and its staff received over its short five years existence.”***

Anon



Table 2



Source: Bid Proposal

## 14 – 16 Years Provision

The 14-16 Years Curriculum for each student would be carefully crafted to deliver a balanced blend of general education (approximately 70-75% of total curriculum time) and vocational education elements (minimum of 25% of total curriculum time). It was recognised that, for this segment of young people, a blend of general and vocational education was essential to motivate them and to provide them with a clear focus on the future world of work (including self-employment) and further work-based training. Students would undertake an appropriate range of GCSEs, a range of basic skills certification, as well as more vocationally related accreditation including accreditation of work experience and the residential and outdoor programmes.

The driving force would be to exploit all opportunities in order to develop fully their intellectual, social, creative and expressive abilities. Achievement would be recognised and rewarded. The vocational education programme would include, at the very least, the following components for each student, which would reflect the ethos of the school:

### Core Subjects

The core subjects would comprise Mathematics, English and Science.

### Extension Subjects

The extension subjects would be at least two, taken from the Arts and Humanities, RE and Citizenship.

### Common Skills Core

This would include numeracy, communications, careers, education and guidance, micro-electronics, basic accountancy, use of

information resources and information systems, understanding of the new environmental technologies, coping skills and general interpersonal skills such as working in a group, accepting responsibility, planning, health and safety and broader citizenship responsibilities. Average time allocation for this each week would be three hours. Maximum integration with the general education, vocational and extension studies programmes would be encouraged.

We believe that this unique 14-16 Pre-vocational Curriculum would be characterised by:

- A diagnostic and assessment phase, linked to the Vocational Learning Plan.
- A core skills curriculum comprising English, Mathematics and Science.
- Common core skills which would include: numeracy, communications, careers education and guidance, micro-electronics, basic accountancy, use of information resources and information systems, understanding of the new environmental technologies, coping skills and general interpersonal skills such as working in a group, accepting responsibility, planning, coping, health and safety and broader citizenship responsibilities. Average time allocation for this each week would be three hours. However, maximum integration with the general education programme would be encouraged.
- Optional Subjects Curriculum to offer balance of up to three additional subjects selected from the Arts and Humanities, RE and Citizenship.
- Vocational Educational Studies including work experience:
  - Eight Vocational Experience Areas in 14-15 Years programme
  - Five Vocational Experience Areas in 15-16 Years programme.
- Residential experiences.

- Optional weekend extension studies.
- An extended school year.

### Diagnostic and Assessment Phase

Assessment of general skill potential and personal strengths would be undertaken in the first month of the Robert Owen Academy Programme (i.e. September 2013) and then would be ongoing throughout the first two years of the Programme for each student. This would be a joint and formative process involving the student and her/his tutors and captured in the Personal Development Section of the Vocational Baccalaureate (Voc.Bac.), forming part of the Vocational Learning Plan (VLP) as part of the Record of Achievement.

### Development of Broad Vocational Skills

This would be a major component of these first two years of the Programme and would be concerned with the development of broad vocational skills which would be related to the predominant occupations both within the footprint of the school and within the Marches sub region.

### Work Experience

It was a matter of serious concern to the Board of Trustees of the Robert Owen Foundation that work experience has rapidly disappeared from the curriculum of many of our High Schools after a significant period of diminution. We appreciated that there are current challenges in locating suitable premises for work experience, conforming to health and safety requirements, supervising the students in the work place and ensuring that appropriate insurance arrangements are in place. We proposed to address these as follows:

### Year 1 (14 – 15 years)

There would be the equivalent of ten, individual day visits to the world of work for each student, which would be in small groups and would be supervised by the school’s Vocational Coordinators. Where possible, use would be made of work-based training facilities to progress this. The visits would be structured with clear tasks for each student to carry out and with a recording process, which would form part of the Vocational Baccalaureate (Voc.Bac) folder.

### Year 2 (15 – 16 years)

There would be a minimum of four weeks of related work experience during the second year of the scheme and for some students this figure would be appreciably higher, up to a maximum of 16 weeks. This would be by negotiation with the student and their family and would be on a part-time basis with the possibility of some block work experience time, particularly in the Summer Term 2014.

### The Residential Experience

### 14 – 15 Years

In the first year of the Robert Owen Academy curriculum there would be six, one-day courses (two per term) at outdoor adventure centres for all students working together in groups. These days would be structured to target specific skills within the School’s Common Core Curriculum. Such courses could also be held over weekends through negotiation with the students and their families. Personal targets would be set for each course and these would be recorded within the Vocational Baccalaureate (Voc.Bac). There would be the additional option of an adventure camping activity over several days during the summer holiday in 2014.

### The Rationale for the Offer of Vocational Skills Areas and the Occupational Contexts

Table 3

VOCATION/OCCUPATION		KEY PURPOSE/SKILLS
1.	Administrative, clerical and office services	Information processing
2.	Agriculture, horticulture, fishery, forestry and the broader land-based industries	Nurturing and gathering Living resources
3.	Craft, design and rural crafts	Creating single or small objects using hand or power tools
4.	Installation and maintenance	Applying known procedures for making things work or function
5.	Technical, scientific or engineering	Applying known principles to make things work or function
6.	Manufacturing or assembly	Transforming materials though shaping, constructing and forming
7.	Processing	Intervention to the working of machines
8.	Food preparation and service	Transform and handle edible materials
9.	Personal sales and service	Customer service
10.	Community and health services	Meeting the socially defined needs of the community
11.	Transport services	Moving goods and people
12.	Performing and expressive arts	Entertainment and cultural transmission

Source: Bid Proposal

15 – 16 Years

There would be a block residential period of one week’s duration (Monday morning to Friday afternoon) in the second year (15-16 years) of the school’s programme. This block residential experience could be at an outdoor pursuits centre, on a university campus, on a sailing or canal boat or wild camping in the mountains. It is envisaged that there would be a menu of options and appropriate choices for groups of students would be a matter for negotiation. Each residential programme would be carefully designed to promote personal qualities such as initiative, enterprise, self-awareness, self-confidence, working in teams and problem solving. The essential opportunity for each student to engage in team/group activities would be of the highest priority.

Outdoor Education – The Weekend Programmes

Experience over many programmes with this 14-19+ age group of students had demonstrated the value of Outdoor Education. Outdoor Education for the Robert Owen Academy would not just offer outdoor pursuits but would seek to present students with physically challenging activities and pursuits as part of the school’s ‘Outdoors for Life’ curriculum.

In the setting up year (academic year 2012-13), in consultation with parents, carers, schools and community organisations, we would develop the Outdoor Education menu, which would be on offer to students from September

2013. We were particularly attracted to the Forest Schools model, where young people spent most of their day outside in structured and unstructured play/exploration under the close guidance of teachers and instructors. We understood well the value and importance of awareness and exploration of the environment in which our students live. As we move forward, young people need to be more aware of what the outside world is like and what it could offer them both in the immediate present and in their future lives.

*Each residential programme would be carefully designed to promote personal qualities such as initiative, enterprise, self-awareness, self-confidence, working in teams and problem solving. The essential opportunity for each student to engage in team/group activities would be of the highest priority.*

We were fortunate in being able to locate the Robert Owen Academy in Herefordshire, with its abundance of rich outdoor settings and personal challenges. The school’s Outdoor Education Programme would be based on residential programmes and/or overnight sessions depending on the needs and circumstances of each individual student. This Robert Owen Academy proposal made it clear that the Residential Outdoor Programme would be banded into 14-16 and 16-19+ groups.

Outdoor pursuits would involve longer stays, some of which could be overseas, as well as in the Marches sub region and would include activities such as:

- abseiling
- assault courses
- canoeing
- caving
- climbing
- gorge walking
- hill walking
- horse riding

- mountain walking
- orienteering
- mountain biking
- potholing
- rowing
- sailing
- windsurfing
- As well as weekend/holiday schools for more traditional team activities such as football, hockey, rugby, netball, basketball, tennis, table tennis and athletics.

At this stage, it was the intention to run the Outdoor Education Programmes within the Robert Owen Academy at weekends on a voluntary basis, which could involve overnight stays, day trips, and residential weekends as well as timetabled curriculum slots within the Monday to Friday allocated teaching and learning time.

Shorter time activities would include:

- awareness of what the outdoors has to offer – land and resources
- building and lighting fires
- building shelters
- fishing
- flora, fauna and natural resources, which constitute our environment
- making tools and implements
- outdoor cooking
- problem solving
- taking care of our environment including the animals and plants that live there
- living off the land – learning what can and cannot be eaten in the natural environment
- recycling
- walking
- risks and dangers in the outdoors
- survival in the outdoors
- wood turning
- rural and local crafts
- understanding local culture including folk music and dance and the making of musical instruments

- reporting and capturing outdoor life with technology, art and craft, in verse and literature and in crafts
- the importance of cooperation with others and the outdoors.

This broad Outdoors Education Programme sat astride the whole academic/vocational divide and would help to give each student a new sense of purpose in their personal journeys to prepare for life and work (including self-employment). We recognised that this programme would be costly and that many of our students would be of limited means, as well as having home commitments in roles such as being carers and part time wage earners. For these reasons, each student’s Outdoor Education Programme would be carefully negotiated so that all could participate in some shape or form without discrimination.

The Rationale for the 14 – 16 Curriculum Balance and How a Typical Study Programme Would Look:

- Core Subjects (up to 18 periods @ 0.75 hours depending on need and negotiation): English – six periods, Mathematics – six periods, Science – six periods.
- Optional Subjects (up to 12 periods @ 0.75 hours depending on need and negotiation): A balanced programme of up to three additional subjects selected from the arts and humanities. This would be in addition to the Common Skills Core.

The 14 – 16 years curriculum for each student would be carefully crafted to deliver a balanced blend of general education (approximately 70-75% of total curriculum time) and vocational education elements (minimum of 25% of total curriculum time). The driving force would be to exploit all opportunities to develop



fully students' intellectual, social, creative and expressive abilities.

It was recognised that for this group of young people, a blend of general and vocational education was essential to motivate them and to provide them with a clear focus on the future world of work (including self-employment) and further work-based training. Students would undertake an appropriate range of GCSEs as well as more vocationally related accreditation including accreditation of work experience and the residential and outdoor programmes.

### Vocational Education Studies

The unique Vocational Baccalaureate (Voc.Bac) would provide a record of competence in a range of study and vocational skills. The Voc.Bac would, in effect, form the Record of Achievement and the skills would be incorporated within the framework of student activities undertaken, e.g.:

- practical
- personal/interpersonal
- enabling/processing
- study/intellectual.

The foundation of Communication Skills would permeate all areas of study and experience. A minimum of ten periods per week up to a maximum of 16 periods per week would be allocated.

The allocation of a minimum of ten periods for the Vocational Education Studies represented only the separate curriculum time identified for this element. In addition, some aspects of the Common Skills Core that formed the vocational education element would be integrated with general education subjects such as English, Mathematics and Science through curriculum mapping. It would be a requirement that the maximum degree of integration must be achieved. As a consequence, the true percentage

of curriculum time devoted to this innovative programme of Vocational Education would be at least 25% and would, in reality, lie within the range 25-35%. The Vocational Baccalaureate (Voc.Bac) would capture the accreditation and experiences for each individual student and the complete qualification range would be negotiated with the national examination boards and accreditation agencies in the period July 2012 to July 2013. It was recognised that our students could be offered the opportunity to undertake a substantial amount of common study with young people who were not on the school roll, through bought-in services during the general education element of the programme.

### 14 – 19+ Years Provision

At the age of 16 years our Robert Owen Academy students would have the advantage of having undertaken a substantial and significant programme of vocational education. It was appreciated that the extent of career definition (including self-employment) resulting from this experience would vary in individual cases. However, depending on the current state of school-leaving legislation it was anticipated that up to 80% of the 14-16 cohort would decide, after suitable counselling and support, to move to one of the specially designed vocational sandwich courses in the 16-19+ phase of the scheme. These courses would have some, or all, of the following characteristics:

- A broad curricular base leading to a range of potential career opportunities at craft and technician levels, particularly within the catchment area of the Robert Owen Academy and the Marches sub region. It was anticipated that a number of students would be receptive to considering more advanced vocational courses in the field of higher education. It was the aim of the Free School that at least 10% of students would

progress to advanced vocational courses in the field of Higher Education. There would be the offer of apprenticeships, which would facilitate this through to Foundation Degree level.

- A minimum overall duration of 96 weeks (i.e. two years @ 48 weeks) with substantial and significant periods of integrated industrial, commercial, business or field experience (i.e. a minimum total of 18 weeks). In practical terms this would correlate to a 38-week year for the academic and taught programmes with the additional 10 weeks as work placements.
- A modular structure to provide maximum flexibility in terms of location, learning programme and mode of study, so that there was also the option of partial integration with other Vocational Education programmes offered by the Free School, with those of traditional Further Education and work-based learning courses as well as with elements of Higher Education courses including Open College Network Access Programmes.

### Personal Learning and Record of Achievement Plan

Smooth progression to a range of nationally recognised qualifications was important. The Voc.Bac was the envelope within which all qualifications would be indexed and held against clear and mutually agreed targets, and details of how the Voc.Bac would work was well detailed in the proposal. The target to work with external examination bodies to accredit the whole Voc.Bac 'package' at Levels 1, 2 and 3 and, if necessary, Level 4 and beyond was also identified. However, we recognised that individual accreditation, which recognises improvement and progress, would be highly motivational to our vocational school student population.

From Day One on 1st September 2013 each student would create, with the help of their tutors, their personal learning and achievement targets for each year ahead, together with provisional targets for the four+ years of the Robert Owen School Vocational Programme. In the area of accredited achievement, it was the intention to offer as wide a menu as possible so that every student could publicly demonstrate progress and achievement. This was not meant to be a definitive menu, the following was provided as an example of the offer that would be available within the 14-19+ provision:

- Open College Network (OCN) units at Levels 1, 2 and 3.
- EdExcel 14-19 Diplomas at Foundation, Higher, Advanced and Progression Levels.
- EdExcel Skills for Life at Entry and Levels 1 and 2.
- EdExcel Generic Learning Award, which would be linked to the principal learning component of the Diploma.

*Forging*



- NVQ units, where appropriate, at ages 14-16 and linked to apprenticeships etc. at age 16+
- GCSEs in Mathematics, English, Science, Humanities, Arts, RE and Citizenship.
- EdExcel Entry Level Certificates at Entry Levels 1, 2 and 3.
- BTEC Awards at Levels 1-3.
- Edexcel Functional Skills linked to the 14-19 Diplomas as part of the Foundation suite of qualifications.
- Foundation Degrees and Open University modules.

**“Herefordshire schools, like the Local Authority, were largely hostile to the establishment and development of the school and it may have been a mistake on our part that we did not originally set the age range at 11-19 rather than 14-19.”**

*A. Batchelor, Founding Member*

- Apprenticeships: This would be a major focus for the Robert Owen School and the German vocational school model, with its seamless integration of general and vocational education, would be mirrored. At the end of the 14-16 years phase each student would be offered a menu of apprenticeships of between one- and four-years duration, providing on-the-job training with industry standard qualifications. Structured apprenticeships would be offered at three levels along with ongoing counselling and guidance for each student:
  - Intermediate Level Apprenticeships Working towards work-based learning qualifications such as Level 2 Competence Qualification, functional skills and a relevant knowledge-based qualification.

- Advanced Level Apprenticeships Working towards work-based learning at Level 3 Competence Qualification, functional skills and a relevant knowledge based qualification.
- Higher Level Apprenticeships. Working towards work-based learning qualifications such as Level 4 Competence Qualification, functional skills and a relevant knowledge-based qualification such as a Foundation Degree.

The Robert Owen Academy, through its existing relationships with community training providers and business organisations, would ensure that the off-the-job training would be provided within the school and in close partnership with the colleges and other specialist learning providers.

Through the Robert Owen Group's close working links with the Co-operative Group, the significant offer from the Co-operative's Apprenticeship Academy would be added to the menu for each Robert Owen Academy student. These would include:

- food
- funeral care
- financial services
- transport
- administration
- pharmacy
- travel
- law
- agriculture.

Vocational education content would justify at least 70% of the total curriculum time, with the remaining time devoted to general education. Vocational A Levels would fit into this category. Individual careers guidance and counselling support would ensure that students were helped to make appropriate choices. Student-centred teaching and learning strategies with individual

study programmes would be planned in conjunction with students. Students with special needs and specific learning requirements would fit into this category, as would students who were requesting accreditation of prior learning, including credit accumulation and transfer.

## Residential Experiences

There would be a minimum of two residential experiences, each of one week's duration and each in the 16-17 years and 17-18 years phases. The first residential programme at the start of Year 3 would be primarily designed to familiarise students with vocational opportunities in other areas and locations, with the objective of broadening perspectives. Team and group activities would be an essential part of the programme.

The second residential programme, at the start of Year 4, would allow an opportunity for a review of the previous year's learning and preparation for the year's provisional programmes in each student's Vocational Learning Plan (VLP).

## Individualised Learning

The students were to be fully supported with counselling and guidance at each step of the way and, in some circumstances, students would be advised to undertake a study programme drawn from more than one vocational course and from more than one training provider. The adoption of a modular structure would facilitate the arrangement of common study with students undertaking other courses and would lead to value-for-money learning provision.

Consideration would also be given to the design of more general vocational education and training courses for those students who had more learning and developmental ground

to travel. Such courses would mirror more closely the second year of the 14-16 years phase, with appropriate vocational options such as technology, business, catering, retailing and caring, particularly enabling those students with greater maturation and learning development needs to progress at a more appropriate rate. There would be the flexibility of forging links between these courses and elements/modules of the more vocational and nationally recognised training courses.

## Qualifications

The Vocational Baccalaureate (Voc.Bac) would record student achievements with details of both qualifications obtained and other attainments in areas such as work and residential experiences. This would encompass the student's whole 14-19+ learning and training experiences and would be in three clear sections:

**Section A** would capture the whole period of student involvement in the Free School's 14-19+ programme of vocational education. It would provide a continuous recorded programme of structured formative and summative support, guidance and planning, which would be appropriate to the student's realistic career aspirations and which, as a minimum, must include work placements, residential experiences, leisure, recreation, community service, creative and aesthetic experiences in addition to any other assessed outcomes.

**Section B** would be constructed and assessed in two complementary ways:

- Transferable units of accreditation  
Units of accreditation in the Free School's Core Curriculum and the 14-16 years Vocational Programme as well as in the 16-19+ Vocational Education Programme.
- Project assignments.



Project-based extensions of and integration with the units of accreditation would take the form of two, short (up to one year) exploratory projects devised within the Free School for the 14-16 age phase, and one long, extended (up to two years) project which may be a negotiated development of one of the exploratory exercises or may have a new range of objectives.

The long project would be devised within the Robert Owen Academy but in best practice it would be a joint exercise with one of the school's partner business or industrial organisations or with a Further Education, work-based training organisation or an Institute of Higher Education. The choice would be dependent on the career aspirations and competency of the student, working either in a team or independently. In the event that levels 1 to 3 of the Voc. Bac were established, the long project would be included in the differentiation criteria for the two levels of award – Voc.

Bac level 2 or Voc.Bac Level 3. To achieve Level 3, the student – among other requirements – would be called upon to defend the long project in an oral examination conducted by a panel to include a representative of the external project-setting body. In the case of Further Education or Higher Education a successful *viva voce* examination might be used as an exemption for admission interview.

**Section C** may contain a variety of additional assessed material at a level appropriate to the student's capacity. It was anticipated that most of the Section C work would be undertaken at the 16-19+ stage. In order to achieve the

Voc.Bac at Level 3 the work must be at NVQ Level 3 equivalency and this would include A level. However, for the majority of a whole ability range cohort it would accommodate a range of NVQ Level 2 outcomes.

The Voc.Bac would be the envelope within which all qualifications would be indexed and held against clear and mutually agreed targets. The details of how the Voc.Bac would work was detailed in the proposal. The target was to work with external examination bodies to accredit the whole Voc.Bac 'package' at Levels 1, 2 and 3 and, if necessary, Level 4 and beyond would also be identified. However, we recognised that individual accreditation, which recognises improvement and progress, is highly motivational to our school student population.

From Day One on 1st September 2013, each student would establish, with the help of their tutors, their personal learning and achievement targets for the year ahead, together with provisional targets for the four+ years of the Robert Owen Academy Programme. In the area of accredited achievement, it was the intention to offer as wide a menu as possible so that every student could publicly demonstrate progress and achievement.

In the view of the Robert Owen Academy's project writing team, students should be offered choice and provision where none had previously existed. However, there was a clear understanding that, in order to spread the message, the school would need to reach out into its wider community.

***From Day One on 1st September 2013, each student would establish, with the help of their tutors, their personal learning and achievement targets for the year ahead, together with provisional targets for the four+ years of the Robert Owen Academy Programme.***

## The Work of the Outreach Tutors

The work of the Outreach Tutors would be key in reaching out to the wider community. The Robert Owen Academy would employ Outreach Tutors to work in contributory schools at Key Stages 2 and 3 to develop an awareness of the work-based curriculum, of the value of vocational training and education and the importance of work, including self-employment.

In the Robert Owen Academy's development phase (September 2012 to July 2013) the key target communities would be finalised. It was envisaged that these would be drawn from Hereford, Leominster, Kington, Bromyard, Ledbury, Ross-on-Wye, Ludlow, Tenbury Wells, Newent, Coleford, Cinderford and Mitcheldene. Within these 12 key communities the KS2 offer would be developed with the contributory primary schools and would be formed into a curriculum offer, with learning materials, built around the target areas of:

- resourcefulness
- curiosity
- self-confidence
- cultural awareness
- social awareness.

During this period, the Outreach Tutors would engage the teachers in the contributory primary schools in a programme of staff development to help ensure the effective delivery of these areas. There would be programmes of visits to a range of vocational and community settings, visits from members of the business community together with Young Inventors' Clubs and Great Egg Race Competitions and Young Co-operators Clubs. From September 2013, Outreach Tutors would work alongside teachers in the delivery primary schools. There would be a sense of the Outreach Tutors supporting the primary schools to build this work into their own curriculum delivery.



*Forestry skills*

In the Robert Owen Academy's development phase (September 2012 to July 2013) the key target community, together with its High Schools, would have been finalised.

Working with the Hereford Academy, the Robert Owen Academy Outreach Tutors would engage with the key staff in the target High Schools to run an intensive programme of in-service training. This in-service training would seek to build upon the primary school target areas and develop these into a KS3 pre-vocational context, which would engage KS3 young people with the Robert Owen Academy's Core Skill Curriculum. Appropriate learning materials would be developed to support this, such as the "Not just for profit" co-operative learning pack, developed by the Robert Owen Group and used by schools nationally.

The Outreach Tutors would support each High School in delivery of this work from September 2013 onwards.



Alongside this work in schools, the Outreach Tutors would work with youth-based community groups, such as youth groups, churches, faith groups, and other community organisations who work with young people, including young carers and youth offending teams. Through their work with a wide cross-section of the community, they would promote the value of vocational education and encourage young people and their guardians to consider enrolling at the Robert Owen Academy.

The Robert Owen Group had, at this stage, two Partnership Managers who engaged with the Group's membership, promoting the work of the Group and listening to members' requirements and needs. The work they were carrying out with schools and community groups would lay the foundations for reaching out to the wider community to promote the Robert Owen Academy. This group of colleagues would be expanded as the school grew and developed.

### Attracting Pupils of Different Backgrounds and Abilities

Although this proposed Co-operative Vocational Free School would offer 14-19+ provision in the geographical County of Herefordshire and surrounding areas where none currently existed, it was anticipated that in the early stages of the school's development it would be a challenge to recruit full ability range cohorts. The Robert Owen Group's experience with other similar projects since 1983 had shown that schools are likely to adopt a somewhat elitist approach to this sort of vocational education provision and are likely to encourage students who have become disaffected with their own academic curriculum to transfer. It was anticipated that it would take time to sell the value of the

Robert Owen Academy's vocational education offer to parents and those who advised and supported young people, and the achievement of anything approaching a full ability range cohort would take several years. However, it was the intention to have recruited a full range of student ability by the time the school was working at full capacity.

### Recruitment and Marketing

The Robert Owen Group had many years of experience in recruiting young people and students, having successfully recruited graduates to its Initial Teacher Training courses for some 14 years and recruited 14 – 16-year-olds to its various vocational education and training courses as well as having successfully recruited for numerous other courses and projects.

The marketing plan incorporated the following areas:

#### The Target Audience

We would work with the community to understand further our target audience, including young people and their parents. Market research would be undertaken, and analysis would be carried out regarding our position within the marketplace.

##### 1. The Benefits of our School

We would develop a brand for the school, encompassing the ethos and distinctiveness of our school. The brand would influence our communications and our engagement with people. The brand would need to convey both the functional and emotional benefits of our school.

##### 2. Our Supporters

We knew from previous experience that word of mouth was one of the best methods of

marketing. We would, therefore, use our growing base of supporters to spread the word about our school. We would regularly engage with them through meetings and consultations, and we would communicate with the wider community frequently. We would seek to grow our group of supporters considerably as the school progressed. Our supporters and the wider community would be key in contributing to the running of the school through the Stakeholder Board.

##### 3. The Marketing Mix

A local marketing campaign would be undertaken to launch the Robert Owen Academy and to invite applications. The campaign would consist of raising awareness of the school by developing news items for local press, radio and regional television. The campaign would utilise web-based media and we would develop a website and use social media to promote the school.

Case studies would be developed focusing on individuals who have undertaken vocational training and have gone on to be successful in employment or self-employment. This would help inspire young people and enable them to visualise the benefits of undertaking a vocational education route. These case studies would take the form of short videos, which

***“The mission and plan for the school was inspirational, radical and potentially powerful enough to change the face of state education in England. It was accepted with enthusiasm by the national decision makers.”***

*Richard Martin, Trustee and Governor*

would be part of the wider, internet-based marketing campaign.

We would hold coffee mornings and drop-in events at local libraries and community centres across the region, allowing parents, guardians and young people to come and discuss the school with us. Attendance at careers fairs would also be an opportunity for open discussion with interested individuals.

An engaging and informative prospectus would be developed and would be available in both electronic and print formats. This would be a key source of information on the specifics of the school, such as the admissions policy, the school day etc. This would be distributed using the Robert Owen Group's community database and our Partnership Managers would work with their schools to circulate the prospectus to parents.

An important aspect of marketing for the school would be the ongoing promotion of parity of esteem between the vocational and academic curricula. This would be important in attracting young people from all backgrounds and help the school to achieve a full ability range. To assist in the promotion of parity of esteem, we would develop a research project on this topic with a partner university, culminating in a conference and paper to be released nationally in 2015. Short research papers would be published in Query, the academic journal of the Robert Owen Group.

##### 4. Measuring and Review

The effectiveness of marketing activities would be measured in terms of recruitment and community support and engagement. The marketing plan and activities would be reviewed in accordance with the information obtained.

## Using the School as a Resource for the Wider Community

The Robert Owen Academy would seek to raise the aspirations of the parent group and would offer those parents and guardians who wished to join in, joint learning with the students. This way we would seek to raise parental ambition and achievement, as well as helping students share their successes and failures with their parents/carers.

The school would become a centre of excellence for vocational training and education and would become a centre for the wider vocational training community. The school, with its Local Learning Hubs would be made available as a resource to local community groups and to local businesses who may wish to run training courses, hold meetings etc.

## The Stakeholder Board and Community Involvement

The Stakeholder Board would sit as part of the governance framework of the Robert Owen Academy and it would consist of members of the Robert Owen Group, community organisations and local employers. The Stakeholder Board would reach out to and involve the wider community by giving the community an opportunity to be involved with and contribute to the governance of the school. The Stakeholder Board, and therefore the community itself, would have input into how the school was used by the wider community. An alternative forum for anyone connected with the school would be through the Robert Owen Group's Members' Council, which would provide a link for members and the Trustees of the Robert Owen Foundation Board.

## The Robert Owen Group Family of Co-operatives (2012)

### Quality Assurance

The authors of the original report were quite clear that once the school opened it would have to meet external measures of quality in common with all other state funded schools. However, the school would additionally implement an internal audit cycle modelled on the internal audit procedures developed by the former Hereford and Worcester County Council and carried out by the Silent Monitors not-for-profit co-operative. Silent Monitors comprises teams of external assessors with considerable experience together with members of staff from the establishment/department under assessment. It was the view of the report's authors that internal peer reviews would be a powerful staff development tool.

Once open, the school would seek to achieve ISO9000 and Investors in People quality assurance marks.



# Chapter 4: The Development Year 2012 – 2013

### Summary

*This chapter charts the challenges of the Development Year. It explains how the Trustees handled those challenges and how they strove to keep open lines of communication with other schools and colleges within the intended geographical footprint of the school. Trustees were aware that there was the potential for others to feel threatened.*

*This chapter covers the appointment of a Principal Designate and the finalising of the curriculum, together with discussions on the eventual site.*

*Finally, it documents the impracticability of employing key staff without a funding agreement in place and the challenges of recruiting Year 10 students to a disused primary school, in a rural village on the outskirts of Herefordshire, with no appropriate transport links and no vocational facilities.*

In July 2012, the Secretary of State approved the Robert Owen Foundation's proposal for development of a new 14-19 Vocational Free School. In September 2012, a funded Development Year started, with clear guidelines and an end of academic year goal of the award of a Funding Agreement by the Secretary of State. A dedicated civil servant, London based, in the Department for Education was appointed and this helpful relationship was sustained through to the award of a Funding Agreement in mid-August 2013 and the opening of the School on 1st September 2013. Within a very short period of time after the announcement, we were invited to send a team to a conference in London for recently approved free schools. Our team reported back that we were advised, along with the others present, not to share our detailed proposal with our Local Authorities. This was later to cause difficulties in relationships.

It became clear very early on that there were at least seven key priorities that had to be successfully met in the development period:

- To establish a charitable trust as a company limited by guarantee to run the school on behalf of the Secretary of State.
- To appoint a Shadow Governing Body.
- To draw up a costed Development Plan with targets through to 31st August 2013.
- To identify, with the Department, a suitable



site for the school – both temporary and permanent.

- To implement a marketing and recruitment programme, which would brief our communities and would start the process of student recruitment.
- To involve local schools, teachers and the Local Authority in our plans.
- To start the process of agreeing a job description and candidate specification for the post of Principal so that a suitable person could, ideally, be in post for the Summer Term 2013. This would mean they would be able to oversee the appointment of other staff, the finalising of the curriculum, recruitment of students, liaising with accreditation bodies, ordering of equipment and completing the many other necessary and important details.

One of the key lessons for others who may choose to follow in our footsteps is the pivotal nature of the Development Year. It was fully and

generously funded, an Education Adviser from the Department was appointed, but it was far more of a make or break period than many of us realised at the time as we were swept along with the day-to-day challenges – of which some were foreseeable, whilst others were not.

We expected that, despite widespread consultation prior to the submission of the proposal to the Department, there would be understandable worries and concerns from other schools, colleges, Local Authorities and other educational providers. We knew that we had to work in cooperation with others to demonstrate that the planned slow growth of the school, together with its Marches sub region catchment area, would offer little significant adverse challenge to any individual school. We planned that the message had to be:

- Increased choice at 14-19 within the Marches sub region family of schools and colleges.
- Driving up standards for those students

currently struggling with a pure academic curriculum who would be more motivated by a vocationally orientated programme slanted towards the world of work through employment and self-employment.

- Low student numbers building over a nine-to ten-year period to an absolute maximum size of 500 students to match the sub regional demographic, equating to a low number of students from each year group in each of the schools and providers in the catchment area.

From the first day of the public announcement of the success of the proposal, the Shadow Governing Body and, from September 2013, the Trust were subjected to intense criticism and attack from all sides within the Herefordshire education sector. The intensity of the criticism, which lasted for the whole six-year life of the school, was beyond belief and bordered on the hysterical. Privately, civil servants and other national officers admitted that it exceeded anything they had observed anywhere in England. It came suddenly, regularly and with an intensity that virtually broke the back of the small, temporary staff team that had come together to manage and administer the early stages of the Development Year.

On reflection the criticism came from:

- Local secondary school headteachers through their local association – HASH (Herefordshire Association of Secondary Headteachers) – and was articulated by some of their newer, more inexperienced members. So much time did one or two appear to devote to this campaign, aimed at

killing the school before it even opened its doors, that some of us were left wondering if the action had been sanctioned.

- The Herefordshire Local Authority, who seemed to take the line that the school was not needed, the funding of the school would take resources from money allocated to other schools and that it would exacerbate an already acute secondary school falling rolls situation.
- The local print media who sought to echo the words and hostility of the local education sector, “Opening new secondary school

would ‘decimate’ education in Herefordshire” ran one headline, with the article further noting that the Councillor had also commented that it was “likely to result in the closure of at least two secondary schools and the downgrading of others.” (Hereford Times, 22nd November 2012).

Unfortunately, this degree of hostility at such an early stage, together with the misinformation and plain

ignorance that was voiced, set the tone of local debate and the level of understanding was such that we never recovered from it and struggled to launch and develop the school on a level playing field.

We were also suspicious that, for some of our adversaries, the real but unspoken driving force was a philosophical objection to what was seen as a politically-driven, Conservative Party initiative. The fact that we were all public servants and that significant inward investment had been won for the Marches sub region seemed to be of little concern to many of the protestors. It was only in the final two years

***It came suddenly, regularly and with an intensity that virtually broke the back of the small, temporary staff team that had come together to manage and administer the early stages of the Development Year.***

Artist Impression - Blackfriars site





of the school's life, between 2016 and 2018, that Local Authority Officers would privately admit that all funding for the school was new money for Herefordshire and had not taken any existing resources away, but the damage had been done and the objective achieved.

Once we knew that the proposal had been accepted and that development funding would follow, we engaged the services of a business management consultancy to work up the development plan into a carefully costed action plan with a timeline and targets. This proved to be a very necessary and helpful outcome and formed the road map through to opening on 1st September 2013. Unfortunately, we were advised by the Department in September 2012 that the use of consultants was not to be encouraged and a daily allowance was set which, in our view, would not have been acceptable to the company we were using. This meant that we had to reallocate staff from other projects in the Robert Owen Group on a part-time and as-needed basis to drive forward the work until the school could appoint dedicated staff once a funding agreement had been signed by the Secretary of State.

As we moved into the Autumn Term 2012, the Trust appointed a Student Support Officer to work within communities to promote the school. This proved to be a highly successful development and, by Easter 2013, some 230 statements of interest had been received from potential students. The Student Support Officer operated

in supermarkets and at leisure centres, at junior sports events, skateboard parks, agricultural shows, community halls and so on. This work allowed the true purpose of the school to be shared with interested young people and their parents and carers. Also, where politically-minded folk tried to ambush the publicity machine in supermarket foyers and other public areas, the true message of the school's proposed work stood up well to such testing.

As this work progressed, parents were reporting that some schools were offering them tangible inducements to keep their child in their current school whilst other schools were, apparently, spreading the message that our school would never open. These reports were coming back to us far too often for us to question their validity.

Through the Autumn Term 2012 the Shadow Governing Body, which now included a potential parent governor and a local business representative, met on a regular basis with

the brief to create and develop the action plan. One of the important early tasks was writing the policies and procedures, of which the key ones had to be given to the Department for approval. This proved to be a valuable exercise in helping to fix in the minds of colleagues the key features of the school and the corporate ethos, which would drive the way in which we would work. The Shadow Governing Body, as it grew in confidence, assumed the key role of working in harmony with the three Foundation Trustees to drive forward the agreed action plan for the Development Year.

***“The School and Academy wholly fulfilled my expectations. I had been abandoned by my previous school in that no GCSE options were available to me. Robert Owen provided not only a path to achieve Maths and English GCSE, but a real opportunity to study vocational skills, which I use regularly.”***

*Student*



*Opening Day Board members*

A further key appointment was that of a Business Ambassador, with a brief to work with the business community across the school's delivery footprint. The aim was to ensure that our business community partners would be well briefed on the nature and purpose of the school and be ready to engage with students and staff once the school opened. This appointment proved to be pivotal and, by the time the Principal Designate was appointed in the early part of the Summer Term 2013, over 160 small and medium enterprises (SMEs) had signed up to work with and support the school. The fact that this momentum was lost once the school was up and running proved to be another factor in weakening the case for technical and vocational education.

Early in the Autumn Term 2012 we offered a dedicated briefing session to Herefordshire Councillors. This was led by the then Chair of Governors and one of the Foundation Trustees. The meeting was well attended by independent councillors, the Green Party and the It's Our County (IOC) Party. The debate was robust but highly professional and positive with councillors most concerned about any negative impact on the schools where they sat on governing bodies. Interestingly, the Leader of the IOC Party assured us of the definite need for the school but warned that there would be

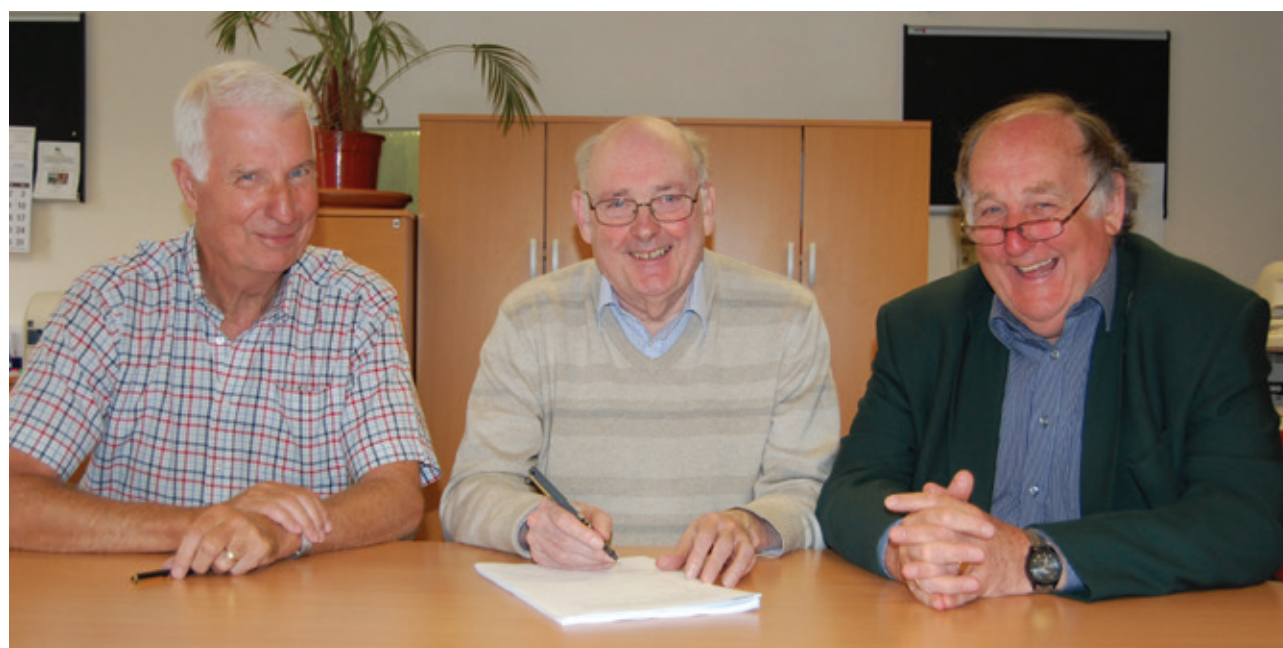
a strong rearguard action from headteachers and councillors from the political parties not in attendance at the meeting.

The then Chair of Governors and a Foundation Trustee offered one-to-one meetings to each headteacher and chair of governors of all secondary schools and further education colleges. This offer was taken up by the majority of secondary schools and the debate was open and frank. Headteachers were advised that this was their school with shared co-operative ownership through the Stakeholder Board and subject to the outline of the proposal to the Department; they could shape its purpose, function and impact going forward. It was further emphasised, as it had been in the meeting with councillors, that this school had a planned, small, student cohort to start in September 2013, which would build over a 10-year period to a maximum 14-19 student cohort of 500 learners. The growth profile had been specifically designed to meet the local demographic. Where headteachers were unable to meet the range of dates offered, the Chair of Governors and the Foundation Trustee visited individual establishments. There could be no question that the message to schools was clear and unequivocal, that this was their school. A combined meeting of headteachers and college staff took place in Shropshire led by a Foundation Trustee.

The Herefordshire Local Authority was dealt with on an individual basis with a meeting between the Foundation Trustee and the Head of Children's Services and the relevant officer. The Chair of Governors and the Foundation Trustee met with the Cabinet Member for Children's Services and the Deputy Director of Children's Services for a detailed briefing. Although we were told by the Department not to release the full proposal to the Local Authority, the Foundation Trustee produced a detailed summary of the key points, which was given to the Director of Children's Services.

The Foundation Trustee, over the period November 2012 to March 2013, visited sports groups, dance and drama organisations and other community groups where young people gathered in order to brief on the work of the school. The Chair of Governors held a range of community meetings with tea and biscuits in village halls across the footprint to brief any members of the general population who wanted to know more about the proposed work of the school. These meetings were well attended.

*Signing of Funding Agreement 19.08.2013. LtoR: Jim Crane, First Chair of Governors, Anthony Bachelor OBE, First Chair of Trust and Chris Morgan, Founding Member*



Prior to Christmas 2012, it was decided to engage with local teachers to encourage them to work with us on the finalising of the 14-19 curriculum with attendant assessment and accreditation. A day conference was held on a Saturday at Herefordshire Group Training Association's premises in Hereford. In order to encourage a full turnout an attendance fee was offered to all delegates to attend on what was, for most, a non-working day. The number of teachers who came was encouraging with over 70 delegates, and the level of engagement in the keynote presentations and breakout groups went far beyond expectations. At the end of the afternoon there was an impressive list of local teachers and lecturers expressing serious interest in employment in the new school, as well as those who wanted to harmonise the new school's curriculum with the Year 10 and 11 offer in their own schools. Sharing of staff through secondments was discussed as a real option to drive this aspect of provision forward. In addition, there had been some highly innovative thinking regarding the shape and form of an integrated, vocational and academic curriculum for the school.

By the time of this conference the hostility from local secondary schools was reaching unprecedented levels and delegates went out of their way to tell us that this was a specific headteacher phenomenon and not representative of the attitudes of other teachers in the hostile schools and colleges. This hostility, together with that from the Herefordshire Local Authority, was a battle we failed to win and was crucial, some five years later, in sealing the fate of the new, highly innovative school.

After Christmas 2012, the Governing Body started the task of finally shaping the job description and candidate profile for the Principal as identified in the detailed proposal submitted to the Department. Once agreement had been reached and the approval of the Department gained, the post was advertised locally, regionally, nationally and internationally. The intention was to attempt to have someone in post for the Easter Term 2013. This would

mean that the detailed preparations could be polished, the list of over 200 interested students interviewed with final offer of places allocated, staff appointed, and both the temporary and permanent premises secured. Equipment could be purchased, and formal links developed with the host Local Authority, the examination boards, a partner university, local employers and direct links for reporting to and consulting with the Trust and the Governing Body established.

In the end, over 40 applications and statements of interest were received from around the world and, working in close consultation with the Department for Education, a list of potential candidates was drawn up to be interviewed over

a three-day period. In order to reflect both the unique nature of the school and the community co-operative ownership, the selection panels and process reflected a broad spread of interest and expertise. The Herefordshire Engineering Employers Association hosted the interviews and provided industry selection tests and the Leadership Trust in Ross-on-Wye provided team building assessment exercises. As far as possible, all outcomes were measured and quantified. By the end of

the third day it was difficult for the Chair of Governors to obtain unanimous agreement on one candidate. On the following day, the Department for Education made the decision for us based on the direct feedback provided by the Education Adviser on the interview panel.

The successful candidate was able to take up the appointment in the Summer Term and engaged in the business of finalising all the key tasks and securing the required number

of students for a September 2013 start. By this time, a partnership had been secured with Aberystwyth University through the Pro Vice-Chancellor. The Department for Education had indicated that the temporary site for the first year of the school would be a redundant, rural, Victorian primary school some distance from Hereford city centre, with no regular, reliable transport links. The trade-off was that a permanent site would be offered in the middle of Hereford City in the Edwardian buildings of the former Hereford Boys' High School, in use at the time as Local Authority offices. The former school buildings were not listed, required considerable renovation – particularly the roof (more on this saga in Chapter Five) –

***The Department for Education had indicated that the temporary site for the first year of the school would be a redundant, rural, Victorian primary school some distance from Hereford city centre, with no regular, reliable transport links.***



and had once housed (in the period 1983 to 1988) the TVEI Pilot Technical and Vocational Centre, serving ten of the Herefordshire High Schools and the Further Education Colleges.

There were wooden structures on the land around the school, which were erected during World War II as temporary accommodation and were now condemned. During the planning discussions that took place it was agreed that these would be demolished, and a new structure put in place to provide specific learning environments for vocational education. We were advised that any expenditure on the temporary Victorian primary school would be taken from the funds set aside for the permanent city centre site.

Chapter Six on Governance sets out in detail how the Trustees, Governors and Stakeholders finalised the overall structure and made it work, trying at every point to reflect the community co-operative ownership of the school. It was highly innovative and the true potential for the other schools, colleges, training providers, Local Authority and community to own the school was never understood and the opportunities were not grasped. Unfortunately, the leaders of local schools, colleges and Local Authority leaders could not overcome their hostility to the creation of the school.

The Summer Term 2013 heralded the run-up to a successful opening of the school on 1st September 2013 and the Governors and Trustees had used the resource of a Development Year well to put most of the major building blocks in place. Three major actions remained outstanding, of which two

depended on the first i.e. the awarding of the Funding Agreement by the Department was necessary to offer students definite places and staff permanent contracts. In the Summer Term, the Principal Designate, the Chair of the Trust and the Acting Business Manager were called to a Ready for Opening meeting at the Department in London. At this meeting the Principal Designate delivered a detailed and effective presentation on the state of readiness of the school to open on 1st September 2013. The Chair of the Trust emphasised the crucial importance of the awarding of the Funding Agreement to a successful start for the school. The Chair was advised that this decision rested with the Minister. This meant that the Trustees could not:

- Offer the Principal Designate a contract beyond 31st August 2013 (the end of the Development Year funding).
- Appoint teaching, non-teaching and clerical staff, who were quite properly seeking security of tenure before resigning from their current posts. In the case of teaching staff, the resignation date of 31st May 2013 had already come and gone.
- Offer secure places to over 200 students who had expressed a provisional interest in attending the school.
- Progress with the ordering of equipment, planning for either the temporary or the permanent site, arranging links with examining bodies and forming contracts for training with colleges and training providers.

In the end, it was not until 19th August 2013 that the Minister decided to award a Funding Agreement – effectively fewer than nine working days before the school was due to

open its doors to the first students. At this point, civil servants were already expressing concerns on the viability of the school and issuing dire warnings of impending closure. Such was the culture of the time and, as one civil servant said to the Chair in an aside and off-the-record comment, “Welcome to the world of Free Schools”.

The end of August 2013 was a frantic period as a hasty and temporary upgrading was made to the redundant, empty, Victorian village primary school at Holme Lacy. The Principal Designate was confirmed in post and a not too successful attempt was made to fill teaching and non-teaching posts for a 1st September 2013 start. Hasty links were made with local colleges and training providers to attempt to fill the gaps. Transport arrangements were not fully and successfully overcome and, for a worrying time at the start of the new term, there was neither telephone nor broadband access and the school was situated in a mobile signal blackspot.

Against this background the other schools and the Local Authority continued to make the most of the school's start up difficulties. There was little understanding of why a new and standard Local Authority School would be made to struggle, with a lack of support and

resources, in the first few years of its life, as the innovative Robert Owen 14-19 Academy was made to do. We were cast adrift as pariahs within the local education family, with prospective parents reporting that they were being reliably informed that the school would be closed by October Half-Term 2013 and that some headteachers were offering the promise of personal laptop computers and extensive learning support assistance to turn down the offer of a place in our school.

So, on 1st September 2013, the school opened its doors to a reduced student intake and extra expenses that were way outside the agreed budget, with income in line with the national funding formula. Already the flame of innovation was dimming and on the verge of being extinguished.

***“I originally got involved with the ROA because I could immediately see that what they were trying to do was have a syllabus that helped to enable young people to develop ‘life’ skills – the same skills that I, and many other employers were looking for in job candidates. As an employer, I am happy to train people in the job specific skills that they need for the role, however, I do expect a certain level of communication skills, thinking skills (deductive reasoning, lateral thinking, critical thinking), problem solving, resilience, self-reliance and empathy.”***

*Deborah Gittoes, Managing Director, Arctic Circle Ltd., Chair of Governors*



# Chapter 5:

## The Robert Owen Academy at Work 2013 – 2018

### Summary

*This chapter describes the day-to-day running of the Academy. It follows the Academy through its five years and charts the highs and lows of running a Free School during this time. It covers the school's opening in a disused primary school far outside of Hereford city centre and moves onto opening the school on what was essentially a building site, a year later. It includes information on each headship throughout the school's history.*

As we write this evaluation document in the balmy weather of August 2018 and the removal lorries are arriving at the Academy to take away the furniture and fittings to far flung new Free Schools, the national debate is beginning to develop pace around our twin challenges. These can be summarised as trying to manage the conflicting and sometimes integrated agendas of the Department for Education, the Regional Schools Commissioner (RSC), the Education and Skills Funding Agency (ESFA), Ofsted and the Local Authority, all in a context of a lack of understanding of 14-19 vocational education and the pressing needs of 'Half our Future', to borrow the title of the 1960's Newsom Report. However, in order to make this evaluation as value-free as possible, we will write about our five-year experience as it happened, and we will try to shut out the background noise from the contemporary national debate.

### Year 1 2013/2014 – The Robert Owen Academy Opens its Doors

The Robert Owen Academy opened its doors on 1st September 2013 to over 70 students, who were accommodated in the assigned, temporary premises of a redundant, Victorian primary school in Holme Lacy village. Holme Lacy is a remote village situated six miles from the centre of Hereford. It has a population of fewer than 500 inhabitants, and no appropriate transport links for school children or, indeed, staff.

There had been minimal expenditure on the temporary premises because the Trust was assured by the Department that there was only one allocation of capital funding and, therefore, as much money as possible should be conserved for the move to the permanent Blackfriars site in central Hereford.

The temporary site had been utilised by up to 50 primary school children through to age 11 years in a small, brick-built school, with an integrated house for the headteacher which, at some point, had been knocked through into the school to create a school office, office for the headteacher and a staffroom. In the extensive school grounds, there was a temporary classroom and a stand-alone, brick-built science lab, which had been added at some point in the past. There was no vocational provision

and the Trust was conscious that it was on a temporary lease from Herefordshire Council and had to be returned in its original condition, with any restoration work to be funded out of the capital grant for the permanent building in Hereford.

A temporary sign was placed over the primary school sign and students were enrolled on Day One, without any reliable public transport access, in a building some six miles from Hereford city centre, which meant that for students from outlying rural areas the return journey to the Academy was in excess of 60 miles. When resisting the choice of this temporary site on the basis of rural location, with no accessible public transport and the complete lack of vocational facilities, the Trustees were told by the Department that it was this site or nothing for a September 2013 opening and that there would be no extra allocation of funding. The Robert Owen Society made available the Society minibus, without charge, so that students could be collected from central Hereford and transported to the various teaching and vocational locations.

The Funding Agreement was not finalised until the third week of August, fewer than nine working days before the Robert Owen Vocational School opened its doors to students. This meant that it was extremely difficult to appoint staff at such short notice, as well as purchase learning materials and equipment. However, when the Minister called all of the September 2013 starters to the House of Lords in August 2013 for a cup of tea and a chat, he made it clear that Funding Agreements were late in arriving, but we were all special people who would cope. The Principal had been on a temporary contract funded out of the Start Up Grant for the Summer Term 2013 and the inability to recruit and offer staff contracts until effectively the last week of August



Above:  
The Robert  
Owen Academy  
temporary site,  
September 2013  
to August 2014

Left:  
Temporary Site Map  
September 2013





Blackfriars site - Year 1 2014/2015



2013 really laid the basis for the later failure. All the other challenges, including the hostility of the Local Authority and the other schools, as well as student recruitment, could have been better addressed with a core of dedicated and newly appointed staff with differentiated roles. In the final event, a temporary curriculum had to be put in place to match the expertise that could be either bought-in on a contracted basis from local colleges and training providers or appointed directly on a short term, temporary basis. It proved a particular challenge to staff the three core subject areas on anything like a permanent basis. A direct result was that the day-to-day running costs were at a much higher level than originally budgeted for and this proved to be another limiting factor, which arguably programmed the Academy for later failure.

The final, first student cohort was skewed towards those individuals with social, learning and behaviour problems, which meant that the culture of the Academy very quickly began to resemble that of a pupil referral unit (PRU). It was reported that some headteachers had

quickly realised that the Academy could cater for some of their challenges on a cost neutral basis. Thus, for reasons outside the direct control of the Trust, Governing Body and Academy Management Team, the Academy quickly came to be seen as a school for challenging students. This wasn't a fair assessment, but it did mean that the challenge to set the Academy on course to become a 14-19 establishment for a cross-section of abilities and behaviours was irrevocably hindered, an experience shared with many University Technical Colleges across England.

The Governing Body, which had been active all through the Development Year, quickly added to its membership and worked with the Trust to define and agree their respective roles and responsibilities. The first Chair of the Trust helped matters greatly when he advised that the Trust should be seen as akin to a Local Authority, whilst the Governing Body could then see itself in a traditional role reporting to the Trust. This became further refined so that the Governing Body agreed that its main role would be to monitor the performance of the Academy

on behalf of the Trust. In order to achieve this, it established certain key committees, which are detailed in the Governance section in Chapter Six.

In writing this evaluation of the five-year operational and delivery period, the Trustees are mindful that a balance must be struck between the minutiae of day-to-day activity and an identification of the influences which led to the Minister's decision to close, whilst we also highlight the student need uncovered and the many successes and the areas where we could have done better. We believe that in order to be of maximum assistance to others setting out on similar paths, the macro issues are likely to be of the most help. Individual projects will approach the micro detail in their own individual ways.

In the Autumn Term 2013, the stresses and strains on the embryo project were considerable. The Principal was tasked with launching a new school in the face of zero support from the Local Authority and other schools and suspicion and uncertainty from the Department for Education. All this in an isolated rural area with poor facilities and inadequate public transport served by an incomplete group of staff. At one level, the Principal had two strong individuals, both with extensive Further Education backgrounds, as Chairs of the Trust and Governing Body respectively but helping these two colleagues and their respective bodies to understand the Principal's role was not easy during these early days. The Department did allocate a new Education Adviser on a set number of days, but the school management was never sure

of the role and, at times, there seemed to be confusion between the roles of 'poacher' and 'gamekeeper'. In the end, it became clear that the role was more to prepare for Ofsted with openly admitted detailed reporting to the Minister directly. There was in this period, and throughout the five years, the continuation of the fear management tactic as summed up by one visiting civil servant, "I closed a school yesterday and I could close you today". It was sometimes phrased differently, "The Minister is very worried about you and could order closure at any time".

**The day-to-day running costs were at a much higher level than originally budgeted for and this proved to be another limiting factor, which arguably programmed the Academy for later failure.**

From this critical period onwards, we were continually left with the view that none of those we dealt with at national, regional or local level, from the Minister downwards, understood the purpose of the Robert Owen Academy as a 14-19 technical and vocational establishment. The Trust began to question seriously if any of them had

read the detailed proposal to the Secretary of State. They certainly didn't understand, or want to understand, the intense local pressure to fail that we were under. One civil servant confided that the hostility from the Local Authority and local schools was greater than anything seen anywhere else in England.

Traditionally, a new school opening in a Local Authority area would be flooded with support – material and human. The management team would be offered mentoring from the Local Authority and subject leaders and key administration staff would be partnered with those offering good practice in other local schools and colleges. Interim arrangements would be put in place to help with school



transport, buy in services, access to student data, linking to Ofsted support, etc. None of these were offered, despite the then Secretary to the Trust meeting with senior Local Authority Officers, sharing information and repeatedly stating that the Robert Owen Academy must be part of the Herefordshire family of schools because all that matters is our children. After many requests, a Link Officer was appointed, who the key figures in the Trust and Governing Body met with on a number of occasions, and these face-to-face sessions proved to be very useful. The final choice of permanent site had not been made and the Trust and Governing Body were keen that a co-location with Aylestone High School in Hereford City, with its undercapacity and proximity to the college campus, be given serious consideration. It was felt that the investment for the new school would boost the growth and survival of Aylestone whilst benefitting all children.

Throughout the early stages, the Secretary and Chair of the Trust repeatedly tried to make contact with the Headteacher to set up an exploratory meeting, but the calls were never returned. A meeting was brokered in the early part of the academic year with the lead civil servant in the Department, the Local Authority Lead Officer and the Secretary to the Trust. It was clear that a positive response from the Local Authority would encourage the civil servants to raise the possibility of the Aylestone High School link back in the Department, although the Trust was warned

that the Secretary of State was not keen to blur the boundaries for new Free Schools. In the event, the meeting was negative, and it was clear that the Link Officer had no delegated authority and he was frank about the negativity towards the Robert Owen Academy expressed within the Local Authority and by the secondary schools. We are sure that the lead civil servant returned to London convinced that there was no mileage in persuading the Secretary of State to create, in effect, a new secondary campus on the Aylestone School site with a technical and vocational 14-19 facility feeding in to the local colleges. This would have been an ideal solution for students, the community and the public purse. In the view of the Trust this was a significant opportunity lost.

In this first term of operation, the stories from the parents and carers of potential and actual students were prolific. An uncomfortable number reported that they had been informed by their current school that the Robert Owen Academy would be closed within weeks of opening and certainly by the first half term in October 2013. Others told us that they had been offered laptop computers, full-time learning support assistance and various other 'perks' if they withdrew their application to the Robert Owen Academy. Into this mix was the constant background noise that the Academy was draining resources from other local schools and that up to two county High Schools would close as a result. Department civil servants kept advising us, in writing, that the funding for the

Academy was all new money, which the county would not otherwise receive. In other words, it was brand new and additional investment, but the misinformation had been effectively put out in the community and quickly became part of the folklore. The local print media, despite the Academy spending considerable and significant sums on marketing and publicity, were not as helpful to a new venture as would be expected. At one point, Trust members were questioned by Department officials as to what lay behind this local hostility and the reply was seen to be three-fold:

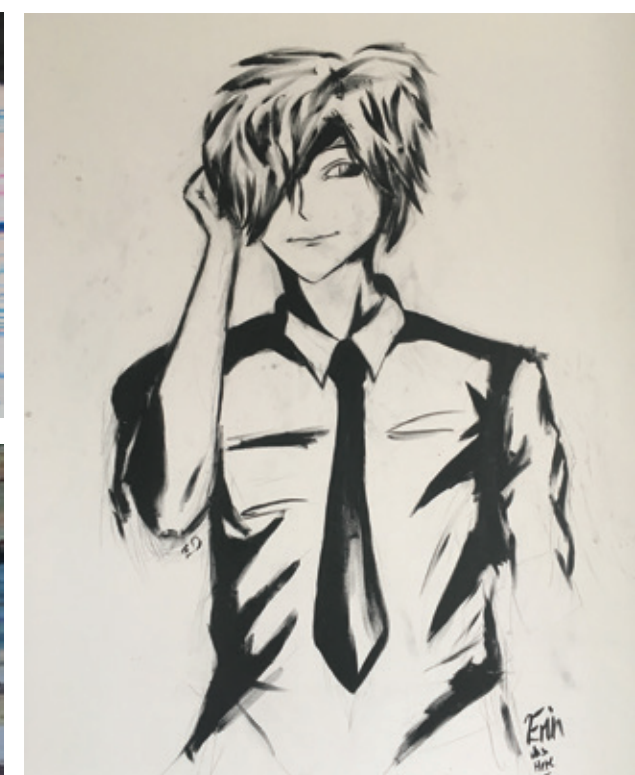
- Political motivation to oppose Government policy.
- Fear of losing student numbers in a falling rolls situation.
- Antagonism to a technical and vocational model, which would challenge the current academic orientation in Herefordshire schools.

The Academy Plan was to serve the six county areas of Shropshire, Herefordshire,

West Worcestershire, West Gloucestershire, East Powys and East Monmouthshire. When discussions were sought in these areas outside Herefordshire it was noticeable that there was far greater support for the model and many innovative ideas were advanced for hub and satellite arrangements. It was clear that the original proposal should not have sought to have been based in Herefordshire. This choice of location was a serious error.

In order to put the record straight, the Trust offered every Herefordshire school and college one-to-one meetings for the Headteacher/ Principal and Chair of Governing Body with the Chair of Governors, one of the Academy Officers and the Secretary of the Trust. Many schools took up this offer and the meetings were frank, challenging and highly informative for both sides. Innovative proposals such as the sharing of staff were discussed but, in some cases, this led to complaints to the Department that we were poaching staff. This was far from the intention and was

*Student Artwork*



***“Having been involved with the Academy, it is my opinion that it was ahead of its time and political decisions were made not on the basis of potential benefit to the community, but on the necessity to cut back funding for the school systems. The lack of support by the County Council was also another factor.”***

*Bill Jackson, High Sheriff of Herefordshire 2016/17*



designed to promote in-service training and development. One governor stated that we were clearly intending to take their “rubbish”. We were a little taken aback by this branding and reported it to the Head of Children’s Services, but little interest was shown by the Local Authority.

Similarly, meetings were offered to elected members where they could come along collectively, receive a briefing from the Chair of Governors and Trust representatives and ask whatever questions they wished. The meeting was attended by representatives from the Independent Group and It’s Our County (IOC) only. The meeting was highly positive and the key issues emerging were:

- Concerns about impact on individual schools where they were governors.
- Fears that the ruling Conservative group on the Council was opposed to the Academy and would seek to undermine it.

A further meeting was offered to the Cabinet Member for Education and the Deputy Head of Children’s Services. This meeting was attended by the Academy’s Chair of Governors, a Trust representative and an officer. The meeting was courteous but in no way could it be described as a meeting of minds.

It would probably be helpful to continue the description and analysis of the five-year operating period of the Academy by sectioning it into the periods under the three Principals and Acting Principal.

The Herefordshire Local Authority appointed a Link Officer to work with the Trust and

Principal, which was highly effective in terms of providing a pivotal communications link between the two bodies. Sadly, this appointment was only short term.

A partnership was negotiated with the University College of Wales, Aberystwyth, which built on the University’s understanding and experience of the Welsh Baccalaureate. This partnership had enormous potential for further development.

### September 2013 to March 2014 – Principal One

The task set for the first Principal was probably without precedent; it was daunting and required considerable prior knowledge of the work carried out since the 1944 Education Act

on integrating the academic and vocational curricula. The Robert Owen Academy was, by design, launched to break the mould, to pioneer an integrated 14-19 technical and vocational curriculum, to act as a centre for innovation and teacher development and to offer up a model that could be replicated, in a cost-effective fashion, elsewhere.

Principal One was an out-of-county appointment from the London area, and delivering this radical package in the second most rural wilderness in England was predicted to add to the list of challenges. Rurality brings with it very specific characteristics other than simply the geographical aspect. The delivery footprint for the new Academy was to be the six counties, and parts thereof, that focus on the City of Hereford. Historically, Hereford has been the commercial, health, agriculture

and further education centre for the market towns of Herefordshire as well as the adjacent territories of South Shropshire, West Worcestershire, West Gloucestershire, East Monmouthshire and East Powys. This extensive area is characterised by:

- Poor communications.
- Poor road and rail systems with barely sustainable public transport and an average of 14 miles between key settlements.
- Centralisation of key services in the city of Hereford.
- A culture that, in common with many rural communities, resists change.
- A shortage of key skills.
- A low-wage economy.
- An outflow of young people to the more urban areas for work, training and higher education.
- A lack of affordable housing.
- A culture in education of institutional isolation, which the creation of Herefordshire as a unitary authority did little, if anything, to resolve.

This complex background meant that the radical Robert Owen Academy was putting its roots down in rocky soil. To add to this there were the immediate and significant challenges of:

- Temporary accommodation in a redundant, rural, former Victorian primary school with no significant branding other than a stick-on sign on the wall.
- A hostile Local Authority offering little or no support, local schools grouping together to block both student recruitment and Academy continuity and local print media hunting for flaws.
- A total lack of specialist rooms, specialist equipment and specialist staff expertise.
- No broadband reception so communications with the outside world were often non-existent and sometimes meant staff driving



Phase 2 building

out in their cars to pick up a signal, with access to emails only at home.

- Lower than expected levels of student enrolment owing to the negative external environment and the rural location of the temporary accommodation.
- An anxious Department requiring regular reassurances on viability.
- A Business Manager (designate) on maternity leave.
- Inadequate marketing and recruitment strategy, which led to a weak community understanding of the purpose of the Academy.
- Under recruitment of staff as a result of the uncertainty about the future.
- Limited funding because of low recruitment and the need to conserve funds for the permanent site.
- A Trust and Governing Body still sorting out their relationship with each other.
- A highly diversified student cohort.





Term One was characterised by a makeshift curriculum, which was structured to meet the needs of individual students, involved many outside trips to Forest School etc. and tried to make use of the two-acre, rural site. The centrally employed staff body was very small, with external services bought in. Inevitably, the internal culture of the Academy came to resemble that of a Pupil Referral Unit (PRU), and it became impossible to shake off this image during the five-year life of the establishment. One headteacher reported anecdotally that, once it was clear that the Academy would open, a collective decision was made by Herefordshire headteachers to send their challenging students to the Academy to ease their own financial and achievement problems and to help to block the Academy from becoming fully comprehensive.

To the credit of the first Principal, who worked hard with students and their parents, often well beyond the working day, individual student needs were, in general, well met. The Acting Business Manager left in November 2013. The Business Manager (designate) was still on maternity leave and this change presented an unwelcome challenge and encouraged the Department to react adversely at a time when resources and staff morale were stretched. Temporary cover was bought-in and a more definitive appointment made from the end of the Christmas Term of a Business Manager who had held a senior leadership role in Further Education. This latter appointment helped, going forward, to stabilise the smooth operation of a rapidly challenged budget.

In the original proposal to the Department the writers had made a conscious decision, going

***Inevitably, the internal culture of the Academy came to resemble that of a Pupil Referral Unit (PRU), and it became impossible to shake off this image during the five-year life of the establishment.***

forward and prior to any staff appointments, to split the Accounting Officer responsibility from that of Principal. It was believed that such a separation of powers would be essential to the health of the Academy and the custody of public finance. This move, once realisation dawned after appointment, was seen by the Principal as a diminution of the Executive role and led to tensions. A visit from the Link EFA Officer indicated that such a split would not be acceptable and that the Accounting Officer role had to be reassigned to the Principal. In the light of national developments in other academies, it is questionable whether sufficient thought was given to necessary checks and balances

within the Department. As the Autumn Term 2013 progressed, the delegation of budget responsibility from the Trust to the Principal became another area of much discussion. Over time, these issues were satisfactorily resolved, and in the six-year life of the Academy, the Trust did not suffer an adverse audit report at any point. The reader has to understand that, in our particular experience, Free Schools were launched

with very little central support, much central interrogation and micro concerns, whilst the Academy's governance and management were working overtime to increase capacity, introduce suitable systems, organise the division of function between Trust and Governing Body and ensure that statutory policies were fit for purpose and in place and Ofsted compliance met.

At the start of the Spring Term 2014, the Principal and the Chair of the Trust engaged in early discussions around the Senior Leader's skills match to the ongoing demands of



the developing Academy. This led, in March 2014, to the departure of the Principal by mutual agreement. A situation that led the then Department's Adviser to be critical of the Trust's motives and, with hindsight, this probably influenced the later 'at risk of closure' paper within the Department. This is purely surmise but developments in subsequent academic years, arising from discussions with both the first and second Regional Schools Commissioner (RSC), as well as visiting civil servants, led to echoes of an existing paper from the lead civil servant recommending closure. The Minister was continually named as the person actively looking for reasons to halt the closure process but not prepared to countenance failure. The Trust was advised that the departure of a Principal was seen as a major risk indicator.

On the departure of the Principal, the Acting Business Manager was given the temporary role of Acting Principal and Business Manager through to the end of the academic year. This proved to be a sound appointment with

student numbers remaining intact and financial viability restored thanks to a loan from the Robert Owen Society. An outline structure for marketing and recruitment was put in place although its effectiveness must be judged in the light of later events. The Department Adviser required an Ofsted recovery/action plan but there was, in this interim period, limited expertise in the Academy to write this and, again, this was interpreted as a further risk factor by the Department.

In the second half of the Spring Term 2014 national advertisements were placed for the permanent position of Principal. In view of all the circumstances the Trust received applications from an encouragingly wide field of applicants. After two days of structured interviews an appointment was made for September 2014 of a colleague who had a background of previous headship and senior leadership. The Department Adviser was present and contributed throughout the whole selection process. The appointment had unanimous approval.

Phase 2 building



## March 2014 to August 2014 – Acting Principal

It was clear, once the Acting Principal took over the reins, that there was a significant deficit in the areas of marketing, publicity and recruitment. This had arisen for several reasons:

- Lack of resources had diverted funding into other areas of Academy activity that were deemed to be of more pressing need.
- Lack of understanding by staff and governors of the difference between marketing and publicity and recruitment. This impacted in two key areas: it didn't put the Robert Owen Academy's true, good news stories into the public domain to counteract the negative perception and narrative and it didn't drill down to direct student recruitment.
- Lack of support from the Local Authority, which meant that less than six months into the opening of a new school the list of essential tasks was daunting and arguably beyond the capacity of such a small staff.
- Too much reliance was placed on the schools' network to offer the Academy as a genuine choice in the end of Key stage 3 options for Key Stage 4.
- There was a lack of local and affordable options which could be brought-in.

The Acting Principal, incorporating the Acting Business Manager role, set about stabilising the Academy following the departure of the first Principal. As a result of supportive work with students, parents and staff not a single student left the Academy. Later on, when it suited the Department to search for areas of perceived failure, too little recognition was given to the successful and sensitive management of this critical period.

During this period very real progress was made with finalising and agreeing a delivery structure

***“I now look forward to the next step of my journey with a peaked confidence and a true motivation to succeed.”***

*Student*

with the Welsh Joint Education Council (WJEC) for the Vocational Baccalaureate (Voc. Bac). This drew on the extensive expertise and experience within the WJEC of the Welsh Bac and resulted in a radical structure, which allowed for the pursuit of academic GCSEs, the incorporation of vocational qualifications and the accreditation of work-based, out-of-school and life experiences. The Voc. Bac went to the very heart of the Robert Owen Academy's mission to integrate both matters academic and vocational and hence begin to address the parity of esteem issue.

As this second term moved on and merged into the Summer Term 2014, the shortcomings of the Holme Lacy site became apparent in terms of the significant extra costs and the absence of any specialist work spaces. This meant that recruiting the second cohort presented an even greater challenge because prospective parents and carers expected to see a specialist vocational education environment. The redundant, rural, primary school site, with minimal investment and absence of specialist provision, did little or nothing to create a sense of awe, wonder and excitement.

As the Spring Term 2014 approached its close, it was clear that the Department had chosen the former Hereford Boys High School site in Blackfriars Street as the preferred option for a permanent base. The Project Manager and main contractor were engaged by the Department to prepare the former Edwardian grammar



school site for a September 2014 start. Intense planning commenced with working groups concentrating on the provision to be created in the old building, whilst discussions were held for a new block extension. Working groups were established to work with the Project Managers to translate the written bid into a delivery environment.

The planning stage for the building work eventually proved to be innovative and stimulating. Experts were brought in to design the kitchen to make sure that it would provide a suitable training and service delivery environment. Three, street-facing retail units were also incorporated to enable real businesses to be invited in to conduct their respective trades, whilst providing Academy students with training environments in actual real-time work environments. The Trust's wish for a green environment as far as possible was met with the acquisition and adaptation of the former Olympic Food Hall for the new vocational teaching block. At each step of the way Herefordshire Council Planning Officers were involved in the proposals and were given regular opportunities to comment, in advance, on what the Trust, the Consultant Architect, the Project Manager and the Department would like on the site. The Council laid down various strictures which were always complied with. In view of this, it was surprising, at a later stage, when the Council demanded that the working retail units be shut down with immediate effect. At this stage there were businesses onsite, working with students on curriculum delivery in real-time environments.

The Summer Term 2014 saw critical planning and delivery on both curriculum planning and

building management. Significant progress was made, thanks to the support of the WJEC, in putting the embryo structure of the Vocational Baccalaureate into a framework that would facilitate accreditation of a wide range of vocational, technical and life experiences, as well as providing an envelope for more traditional academic and technical qualifications. This highly innovative work was potentially ground-breaking in terms of the skills needs of local businesses as well as addressing the parity of esteem challenge.

As the last term of the academic year began to draw to a close, uncertainty about the future led to a number of staff departures for more certain employment. The work on the permanent

Blackfriars site in central Hereford continued to move forward at a pace, with the focus on the refurbishment of the former Edwardian grammar school building, 'Phase 1'. In subsequent years it became clear that the upgrading had been essentially cosmetic. It was projected that this work, together with the arrival of the former Olympic Food Hall on site, with its specialist vocational and technical provision 'Phase 2', would be ready for a September 2014 start. In the event it wasn't ready, and we started our second academic year, again with no specialist vocational provision, but with the additional challenge of having no outdoor space for a cohort of 14-16-year olds. Unsurprisingly, this had a serious impact on student recruitment. During this period there were echoes from outside the Academy that the acquisition of the Blackfriars site by the Department had not found favour with the Member of Parliament for Hereford, who had identified the site for the new Hereford University project.

**We started our second academic year, again with no specialist vocational provision, but with the additional challenge of having no outdoor space for a cohort of 14-16-year olds.**

The latter part of July 2014 heralded the first Annual Meeting of the Robert Owen Academies Trust, which was combined with the Annual Meeting of parents and carers. This was to prove to be a tradition which was maintained right through to the final Annual Meeting on 18th July 2018. This first meeting was well attended with several vigorous and supportive debates on the current and future work of the Academy. It was agreed at this meeting to change the initial and provisional name of the school from the Robert Owen Vocational School to the Robert Owen Academy. It was also noted at the meeting that due to the heavy and extraordinary demands on the budget, there was a need for a loan to be granted from the Robert Owen Society to ensure that a deficit budget was not posted.

The year ended with a structured, two-week programme of visits, residential activities and outdoor pursuits.

## September 2014 to April 2017 – Principal Two

On 31st August 2014 the Acting Principal handed over the reins to the substantive Principal. This period was both the most dynamic and, essentially, the most eventful. It signified the longest period under one

Academy leader who had, as a foundation, the work completed in the Development Year and the first year of operation under the first appointed Principal and then the Acting Principal. Later events indicated that already papers were in preparation within the Department to start the early processes for closure. Some felt that the departure of the first Principal had kick-started this process within the feverish national picture of a loss of confidence in free schools, studio schools and university technical colleges. However, the apparent *fait accompli* closure has unclear origins, but much time, trouble, student and professional disruption could have been saved had there been greater openness and transparency around this. The Trustees, Governors, Stakeholder Board and Staff retained their faith in the Robert Owen Academy project whilst around them others seemed to be plotting its demise.

The second substantive Principal assumed leadership responsibility for the Academy on 1st September 2014. Student recruitment for the academic year 2014-15 was well below target, which was a clear result of the lack of certainty around the future of the Academy linked to the unfinished nature of the permanent Blackfriars site in central Hereford.

***“I’d like to thank you for presenting me with a great opportunity to succeed. Without you all I’d probably still be fighting my way back into mainstream education. You have made my transition back to full time education an amazing experience, one that could not have been achieved without the school’s extraordinary levels of respect and belief towards me. Where many other schools would say, “too much for us, please go away”, you’ve really had me, and everyone else at the school, in your best interests 100% of the time.”***

*Student*



## Year 2 2014/2015 – The Move to Blackfriars

### Phase I – The Old Building

After a tough opening year, forced to work outside of the remit of the original bid due to the inappropriate temporary accommodation, students and staff alike were looking forward to attending school on the brand new, city centre campus, which promised specialised vocational training facilities and over an hour per journey saved in travelling time. The Robert Owen Vocational School was rebranded the Robert Owen Academy in August 2014 and welcomed its second cohort of students in September 2014 onto the Blackfriars site. Students and their parents/carers were soon to be disappointed – the Blackfriars site was little more than a building site, with no outdoor facilities for the students. There was soon a high level of frustration amongst students that they could not go outside, leaving many feeling trapped, thus triggering high anxiety and associated behaviours. Staff had to accompany students off-site to the Memorial Gardens over the road in order for them to have some fresh air and let off steam. This put significant additional strain on a new staffing team. The lack of outdoor provision echoed through the classrooms, making teaching increasingly challenging.

To add to the strains of teaching on a building site, it very quickly became apparent to staff that the Blackfriars building itself had been cosmetically enhanced as opposed to renovated, and so the long lists of defect reporting began.

*To add to the strains of teaching on a building site, it very quickly became apparent to staff that the Blackfriars building itself had been cosmetically enhanced as opposed to renovated.*

Defects, as to be expected, were reported on a varying scale, from low level issues such as inferior quality door handles and radiator valves to larger scale issues, which are still ongoing at the time of writing this evaluation, namely:

**Woodwork** – a large number of windows and sills were rotten; these were reported, and the only remedial action taken was to add a little more filler and a lot more paint. The Principal and Business Manager were told, on many occasions by the builders, that they, “have done the job that they were asked to do” by the MACE Project Managers and that there were no funds to replace the rotten woodwork, and that this would be a, “much bigger job”.

**Roof** – by midway through the first Autumn Term at Blackfriars, the roof had started leaking in the upstairs classrooms, at multiple points. The first response received from the builders was that it was due to the guttering being blocked by leaves from the trees overarching the building. Questions were raised that surely these had been cleared as part of the ‘renovation’ and that given the location of the onsite trees, that a mesh type system should be in place to stop blockages? As neither of these options seemed to have taken place, the Robert Owen Academy had to endure immediate, unplanned expenditure to hire a cherry picker to clear the guttering, however, this did not stop the leaks in the classrooms. The builders were contacted several times and, eventually, the Business Manager was informed that in their opinion, the roof needed replacing in its entirety within an expected five years. The mitigating action noted, ‘the tenant should be advised to have





a large maintenance budget'. Furthermore, it was reported that the TVEI Pilot Managers were advised, in July 1983, that the roof was beyond its planned lifespan. This was reported to colleagues at EFA, and the response was that a Condition Improvement Funding (CIF) bid could be submitted. The Principal and Business Manager argued that, given we were in receipt of a 'newly refurbished building' it was unacceptable that we should have to submit a bid for a new roof at an anticipated cost of c.£500k within weeks of initial occupancy. EFA officials responded with a 'leave it with them', however, no funds were ever received to reimburse these additional, unforeseen costs, despite several requests by Academy staff. Several 'patch' jobs were undertaken, to enable the classrooms to be a dry, safe teaching

environment for the students and staff. The remedial works to continually 'plug' the roof had to come from in-year general funding, as the Academy was new it was not in receipt of an in-year capital funding allowance, due to the significant amount of capital budget already allocated for the build. This decreased the budget available for other much needed areas, namely PR and marketing, which at this point were needed more than ever. To add to the challenges of recruiting to the brand new, vocational study option for the region's 14-19 year olds, without having any vocational facilities, the enrolled students were spreading the message that the building was old and not up to standard and that the classrooms were wet – another nail in the recruitment coffin.

## Phase 2 – The New Building, the Vocational Workshops

Upon opening the site in September 2014, the new 'Phase 2' block, which was to be the vocational and technical heart of the new Academy, had yet to be built. The new timeframe was scheduled for a January 2015 opening, and the Principal, supported by the new staff team, devised a temporary timetable for the Autumn Term 2014.

Late financial difficulties between the EFA-appointed Project Managers and the Department meant that there were challenging budgetary issues. Several areas were soon to be 'Value Engineered out', meaning that some resources were cut completely, and some were reduced. A significant saving was made when the science equipment was relocated from a closing free school in another part of England. This, once again, resulted in further set-backs to the project plan. The facilities were not available in January 2015 for the students, and so the temporary timetable was extended into the Spring Term 2015.



Engineering Facility - October 2015

In May 2015, the Principal was handed the keys to the newly installed 'Phase 2' building, the students were excited as they had been waiting to use the 'state-of-the-art' equipment, which had been promised to them over the past 18 months. The building, however, whilst complete on the outside still contained no specialist vocational equipment. There remained a fairly long list of remedial actions, which needed to be addressed before the building was close to being fit for purpose for an innovative 14-19 educational environment, or even to meet basic safeguarding and health and safety conditions. For example:

- The open plan, unisex toilets did not have cubicle walls from the floor to the ceiling so that the lower section of the cubicle could be seen from the corridor!
- There were no blinds fitted on any of the c.200 windows.
- The construction, engineering and horticulture workshops were one big open space, thus inviting contamination into the specialist equipment (yet to be installed).
- There was an inadequate power supply installed for the planned workshop machinery.

These, and many other remedial actions took place over the Summer Term and into the third year, 2015/16.

## Year 2 – Students, Staff and Curriculum

In addition to the appointment of the second Principal, permanent staffing appointments had been made, core subject teachers, vocational tutors and support staff were finally in place to provide stability for the students and the Academy as a whole, however, the challenges in appointing permanent staff in Year One were becoming ever apparent. An intense

**“This school has consistently been the victim of a lack of support and often attack, and that has manifested itself in this decision, which lets down our young people and their families by taking away the trust they have placed in the education system.”**

Anon

programme of core subject study was put in place for the Year 11 students, who would shortly be taking their GCSE examinations. Core subject teaching staff came at a cost, permanent full-time contracts had to be offered in order to ensure high-quality teaching staff were in post to see the students through their GCSE examinations and to recover from the improvised temporary teaching roles of Year One. On paper, 0.5FTE appointments would have been the ideal scenario, but putting the students first, the Trust made the decision to appoint over the pre-planned recruitment levels, in fear that they would otherwise have let down Robert Owen Academy students.

In October 2014, the Chair of the Trust, Chair of Governors, Principal and Business Manager met with the EFA Senior Caseworker. Discussions over the financial health of the Academy took place. The EFA Senior Caseworker was amazed to hear that the Trust had held back the anticipated Pupil Number Adjustment (PNA) clawback from Year 1, so that it could be repaid when requested by the EFA. The EFA Senior Caseworker told Academy colleagues that most new schools had spent their overfunding and suggested that the Trust did the same and



brought forward its planned staffing model to raise the Academy's profile and strengthen its offer to provide additional help and support for students, staff and the Principal at this difficult time of negative publicity and low recruitment. To attempt to counteract the damage caused by the building delay, advertisements were placed for a Vice-Principal and full-time Mathematics Teacher.

A dedicated vocational tutor was recruited, and a limited vocational curriculum was offered in-house, after the EFA agreed to keep the Holme Lacy site operational. Students were able to undertake limited vocational studies in horticulture and some introductory units in woodwork towards a construction qualification. The remaining vocational offer still had to be bought in from other local providers as the planned onsite provision had yet to be built, furnished and equipped. This came as an additional, unbudgeted £35k worth of expenditure.

Upon moving onto the Blackfriars site and in the light of an already strained budget, the Business Manager took on the additional responsibility of Examinations Officer, and immediately sought Joint Council for Qualifications (JCQ) inspection to be an accredited centre to run examinations. This was unable to be sought during Year One as a key part of the initial inspection process is to view the site and security arrangements for storing live examination papers. Accreditation was successful and registrations to individual examination boards were made in preparation for the Summer GCSE examinations.

## Year 2 2014/2015 – External Support and Inspection

### DfE Adviser 2

**1st full Ofsted Inspection:  
19th – 20th May 2015;  
Overall Grade: Inadequate**

**Student recruitment remained a significant concern. Parents would not move their children at the end of Year 9 to a site which resembled a builder's yard, to work with students widely perceived as more challenging or difficult.**

Here, teaching was felt to be a serious weakness where not enough progress was made and teachers did not inspire and motivate pupils to achieve their potential. The report identified behavioural problems and attendance. Pupil conduct was also identified as an issue. On the positive side, it was appreciated that a new Principal and Vice-Principal were in post and that staff genuinely cared for pupils, and the values of and progress in vocational areas were identified.

## Year 2 2014/2015 – Finance

Significant additional expenditure was incurred over the course of 2014/2015 to provide off-site training, transport and assessment for students in the vocational areas. Core subject staff were previously non-specialist, as in 2013/14 recruitment had proved to be near impossible considering the context of the Academy. In addition to the impact on Academy budgets, opportunities to market the Academy were hindered to such an extent that student recruitment remained a significant concern. Parents would not move their children at the end of Year 9 to a site which resembled a builder's yard, to work with students widely perceived as more challenging or difficult or, to quote a local police officer, to, "a school for

naughty kids". Once this misinformation hit the tight knit, rural mind-set of the local community, there was almost no return, or at least, not without a hefty publicity budget.

## Year 3 2015/2016 – Site

September 2015, Year Three, and, the whole of the permanent Blackfriars site was open to students. By the second half term, the vocational workshops had been fitted out with equipment, and finally the Robert Owen Academy was in a position where it could deliver its own training to comply with the core aims for the pioneering curriculum as per the original bid.

However, all was not to be as positive as it seemed, and it felt like the Local Authority continually tried to block progress wherever it could.

**Real time business units**—Trustees received a letter from Herefordshire Council, demanding that the three, dedicated real-life business units

be closed with immediate effect, and that the Academy's business partners be evicted. In February 2016, the Principal met with Council Officers and was informed that a retrospective planning application would need to be submitted which would, in essence, decide any further action; should objections be raised and upheld then the onsite business partners would have to close down their outlets. Following months of dialogue between Herefordshire Council, the ROA's Principal and Business Manager and the Education and Skills Funding Agency (ESFA), Herefordshire Council Officers eventually accepted that these units were as agreed in the original bid, and that a simple Licence to Occupy agreement should be put in place, which would have the landlord's consent.

**Going Green** – now that the site was open, quotations were obtained from several local suppliers to install solar panels; this had been clearly identified in the original bid. A preferred supplier was agreed by the Trust, and the company was instructed to move forward.

Toilets on handover



It all appeared to be going smoothly; the Academy had one more tick in its 'green' box, and the Business Manager was looking forward to budgetary savings on the Robert Owen Academy's energy bills, when on 15 May 2017, the Trust received notification that the landlords (Herefordshire Council) had refused the solar panel installation, as the existence of such a sub lease would be detrimental to the Council's reversionary interest, should the lease be terminated. The implication was that the Council did not envisage the Robert Owen Academy being onsite for 25 years, despite it having a 125 year lease.

### Year 3 2015/16 – Students, Staff and Curriculum

Student enrolment continued to be below anticipated numbers, again due to the bad press the Academy was receiving locally; rumours of the school's closure continued to rumble on through the community. Students, parents and carers were unable to visualise the 'final school' that would be open to them for September 2015, when they attended several

open days throughout 2014/2015, largely due to the building site and no vocational facilities being available to view.

### Lowering the Age Range to 13 – Year 9

Following a meeting with the Regional Schools Commissioner (RSC) in November 2015, a public consultation was held to investigate support for the Academy to lower its age range from 14 to 13, thus making it a 13-19 Academy. It was anticipated that this would help secure the Robert Owen Academy's future in two ways:

1. To fully embrace the challenges that work placements and vocational training can bring, the Trust recognised that a foundation learning year would be essential for students to be able to take on higher level GCSE, technical and vocational qualifications by the start of their Key Stage 4 programmes of study.
  2. It would aid recruitment and, therefore, increase income and put the Robert Owen Academy on the path to financial stability.
- The parental response received was very

encouraging and there seemed to be a common view forming that parents would be less concerned about moving their child to a new school at the start of Year 8, than Year 9, the traditional start to a two-year GCSE programme. Twenty-six expressions of interest were received by parents who wanted their child to start immediately!

The Local Authority seemed to adopt a relatively positive approach, and at last colleagues felt relationships with the LA were on an upward turn.

On 30th March 2016, a formal application for lowering the age range was submitted to the DfE. No response was received, and the RSC was contacted towards the end of the Summer Term for an update. The RSC provided a dismissive reply that our request had not been accepted. Another positive opportunity for the Robert Owen Academy to succeed had been declined, for reasons which have never been made clear.

### Year 3 2015/16 – External Support and Inspection

#### DfE Adviser 3

#### Ofsted Monitoring Visit: 12th January 2016

In the main this was a positive monitoring visit with Her Majesty's Inspector (HMI) noting the benefits which three new members of staff had made. He saw improvements in planning and delivery of lessons and a better use of data and information to track pupil progress. However, he commented that both attendance and achievement figures were below national

averages. One must consider that GCSE figures had not had a full year to improve since the full Ofsted inspection in 2015.

### Year 3 2015/2016 – Finance

In December 2015, officers from the Academy met with EFA representatives and put forward an initial payment plan for the 2014/15 PNA. This was neither accepted nor rejected and no PNA clawback was paid.

2015/16 was again a difficult year, as previously mentioned. Significant under-recruitment lead to a PNA in excess of £300k, making the total near to £600k PNA clawback owing.

In light of this, a Financial Notice to Improve (FNtl) was issued to the Trust in the Summer Term 2016.

The issue of a FNtl based around financial mismanagement was not an accurate reflection of the circumstances that were present since the Academy opened in September 2013, in wholly inappropriate temporary accommodation. The Trust acknowledges that the proportion of the allocated budget used exceeded the theoretical threshold for mainstream learners, however, they argued, in the strongest possible terms, that the significant additional needs of the recruited learners necessitated significantly higher levels of staffing than a traditional, mainstream school.

An Independent Financial Review was commissioned in June 2016, as per EFA requirements. The auditors noted that adherence to the Academies Financial Handbook was taken seriously by those

Year 1 2014/2015





charged with governance and there were found to be no omissions in the systems of financial monitoring and control.

The auditors summarised that the problems leading to the issuing of the FNtl letter stemmed from the difficulties in forecasting and monitoring pupil numbers and addressing the resulting financial effects.

This review came at a significant additional cost to Robert Owen Academy, for which no additional funding was provided, i.e. it had to be taken out of the already overstretched budget, adding to the deficit.

## Robert Owen Academy – The Ways Back to Financial Stability

### 1. Joining a MAT

In the meeting with the RSC and senior civil servants in November 2015, it had been made clear to the Trust that the preferred way forward for all Single Academy Trusts was for them to join a Multi-Academy Trust (MAT). After the meeting, a senior civil servant suggested that we might like to undertake a process whereby we could identify a preferred MAT partner who would be a close fit with our co-operative values and principles and who would understand the challenges of our rurality. As a result, the Trust carried out a consultation exercise with some 12 potential MATs and produced a shortlist, each of whom was interviewed by the Trust. Out of this, two preferred MAT partners emerged – the Eden Schools Academy Trust (ESAT) in Manchester and the South Gloucestershire and Stroud College (SGSC) MAT. The ESAT was the ultimate preferred partner because they offered:

- An outpost medical school. This would address the acute local medical and caring staff shortages which had been identified in a recent meeting with Herefordshire providers.
- Significant and additional inward investment to the Robert Owen Academy as a result of a multi-millionaire's offer of business sponsorship, following a meeting with the Trust.

These findings and the Trust's agreement were communicated to the RSC by the Chair of the Trust, but again, no reply was received and eventually we were given a verbal reply that Manchester was too far from Hereford and that the RSC wanted us to join a local MAT.

Given that there were no suitable local MATs, a meeting was held with Herefordshire Council to explore whether the Local Authority would help the Academy form a local potential MAT partnership but eventually the offer was declined.

### 2. Subcontract Arrangements for the BTEC Extended Diploma

At the end of 2015/16, officers were in discussions with Virtual Learning UK (VLUK) to enter into a sub-contract agreement to deliver a BTEC Extended Diploma in Sport to four sports clubs within the West Midlands. This would have seen a significant boost to the Academy's post-16 recruitment, as well as bringing in an additional income stream to support the mainstream funding received from the EFA. As a direct result of the increased student numbers, officers predicted full repayment of the outstanding PNA clawback within three years. It was also anticipated that a successful BTEC Sports programme would encourage students to apply to the Robert Owen Academy for Year 10 entry

to secure their post-16 sports place. Finally, a workable solution had been found to promote a positive, affordable market for the Academy's future. Officers presented this proposal to the EFA and were given a very disappointing response, that this was not to go ahead, largely due to the FNtl that had been issued, even though the independent audit had confirmed that there were no concerns over financial management. Yet another block put on a positive way forward for the Robert Owen Academy.

In July 2016, the Trust summarised its core aims to secure the Robert Owen Academy's future as:

1. To join a suitable (agreeable to DfE) MAT that fits the mission and ethos of the Robert Owen Academy.

2. To lower the entry age to 13 years i.e. the end of Year 8.
3. To work with others to build the unique status of the Robert Owen Academy as a provider of 13-19 technical and vocational education to mixed ability students and to seek staff appointments that will facilitate this.
4. To develop within the Academy a specialist unit which will cater for 10% of the total Academy student cohort through structured provision to allow for dedicated support to those who need to repair their lives.
5. To optimise governance efficiencies through continual review, e.g. rhythm of governance, financial management, whole school advancement.

Official opening by Bill Wiggin, MP



## Year 4 2016/2017

### Principal Two: September 2016 – April 2017

### Principal Three: May 2017 – August 2017

## Year 4 2016/2017 – Site

The phase 2 building was in full use for the first full year since the school opened in 2013. The vocational workshops were fully functioning and put to good use.

No additional funds had ever been granted to repair the leaks and a Condition Improvement Funding (CIF) bid application to replace the



Clearing the trimmings – Pre-BBQ

roof was submitted in December 2016. In April 2017, the Trust was notified that this bid had been rejected by the ESFA. The already strained budget had additional funds for repairs, but leaks were appearing in all the teaching rooms and managers deemed it an unsuitable teaching environment. In the interests of student and staff welfare, all classroom-based teaching was moved to the phase 2 modular building.

## Solar Power

In March 2017, plans to have solar power installed in the Blackfriars building had eventually come to a stop, when the landlord (the Local Authority) effectively informed the solar supplier that the Robert Owen Academy would not be onsite for the duration of the lease period. Installation of the panels was stopped, even though the lease agreement would have been transferrable, and even if the Academy were not onsite, any future tenants would have reaped the benefit.

## Year 4 2016/2017 – Students, Staff and Curriculum

Recruitment continued to be the biggest challenge. 2016 was the first year that students were to enrol on a fully equipped academy site; the Robert Owen Academy had no track record for vocational training and set alongside this was the negative misinformation that was being drip fed in the community. It all added to the failure to recruit to target. September 2016 was to be the lowest Year 10 entry over the life of the Academy. This extraordinarily low level of recruitment, coupled with the continual blocking of all the Trust's additional revenue proposals, ensured that financial stability was almost impossible.

Over the summer 2016 period the Academy was lucky to receive the offer of a donation

to support recruitment in Science, Technology, Engineering and Mathematics (STEM) subjects. Students were able to apply to the Robert Owen Academy for a scholarship worth up to £1,000 to support their chosen Technical or Vocational programme of study and, in return, they would receive professional industrial/business experience, integrated classroom and work-based assignments and a guaranteed work interview at the end of the programme. Even this, unexpectedly, did not have the positive impact on recruitment that was anticipated.

Students continued to apply to the Robert Owen Academy over the course of the year, thus bringing challenges for teachers to continually welcome new students to their classes, each arriving with a unique background of prior education. Whilst the Academy needed student numbers, many students were discouraged from moving mid-year, as it was felt that this would adversely affect their education. A few parents were so discouraged by the lack of support given to their child at their current schools that they pressurised for their child to be accepted. The LA had informed the Principal that as the Robert Owen Academy had vacancies, it was not able to refuse entry. Parents continued to seek places, even after they were informed of the December 2016 Ofsted Inspection outcome of special measures.

## Staffing – May 2017 Onwards

It was evident that the staff were unsure of their future as both the Principal and Vice Principal had left in the Spring Term 2017. However, from

the difficulties which were past it was possible to create a bespoke team with more long-term prospects. A temporary appointment of Executive Principal was made and three senior staff members, without additional pay, stepped up to fulfil the roles of Assistant Principal, each with delegated authority to deputise in the absence of the Principal. The team pulled together, and stability was provided to the students.

***“Please take [anon]. S/he is so disaffected and is refusing to attend [school]. Even if the ROA closes next year, at least s/he would have had two more terms in school. If the school closes I will deal with this when it happens.”***  
Parent 2016/17

Any new venture, public or private, comes with an element of insecurity. Equally, it is true to say that over the last 30 years the notion of a ‘job for life’ in the state or state sponsored sector no longer applies and market forces have a major impact. However, even given this generic picture, the Academy had difficulty in providing

security for staff, students and parents. Staff unsure about their future given the lack of support from many government agencies, students and parents unsure if the Robert Owen Academy would be there in the ‘long run’ for stability of study.

## Pressure on the Leadership Team with Impacts

To be on any leadership team has ramifications as leaders make decisions, which have an impact on the academic (and social) lives of others. The high levels of uncertainty concerning funding and pressure from Ofsted took their toll on senior leaders; the lack of funding and no permanent site on the first Principal, the stewardship of the penultimate Principal caused severe stress and anxiety and there was a clear breakdown



in communications and synergy between the Principal and his newly appointed Deputy. Trouble at higher levels always has an adverse knock-on effect lower down any organisation.

## **Year 4 2016/2017 – External Support and Inspection**

### **DfE Adviser 3**

### **2nd Full Ofsted Inspection: 16 -17 November 2016 Unpublished Outcome: Requires Improvement**

The Robert Owen Academy was subjected to its second full Ofsted Inspection whilst under the reign of its second Principal. As expected, lessons were observed, student work was scrutinised, various interviews with staff, students, Governors and Trustees were carried out alongside the standard data review.

At the end of the second day, verbal feedback was received, this was in the main positive and followed the theme of the mood of the monitoring visit in January 2016. Unofficially, the first Ofsted team left provisionally identifying a Requires Improvement (RI) grade in feedback with the Principal and Chair of Trust. The Inspectors had noted that due to small student numbers, it was not viable to look at some of the data sets as percentage figures, but instead they focussed on the distance travelled by students and the positive impact the Robert Owen Academy staff had had on their academic studies, behaviour and attendance in such a short time. The Inspectors could see that there were instances where some students had only been on roll with the Robert Owen Academy for as little as six weeks prior to taking their GCSE examinations, yet they were to be included in the Academy's overall attainment

figures as part of the data required for Ofsted scrutiny.

Given this conflict between what the Inspectors had seen versus cold data, the Lead Inspector telephoned Ofsted Head Office to notify them/seek approval for a recommendation for a Grade 3 'Requires Improvement' outcome. The Chair of the Trust, Principal and Business Manager were present when the Lead Inspector confirmed that this Grade 3 judgement was agreed. Pleased beyond belief, the Chair of the Trust was notified, and everyone went home very happy! However, recognition of the distance travelled by our students, the hard work and dedication from the staff and general improvements to the management of the Academy was to be short-lived.

### **2nd Full Ofsted Inspection, second visit: 6th December 2016 Outcome: Special Measures**

Some 12 working days later, the Robert Owen Academy received a further visit from Ofsted; the two HMIs, who seemed intent to overrule and refute the findings of their earlier colleagues, unleashed a tirade of criticisms against the Academy, which took many by surprise as these were not the findings presented 12 working days earlier. They did not observe any lessons, they did not look at students' work and they did not speak to staff or students. They focussed their visit on cold data alone. It was clear that there had been external pressure on the first team and the second team came in with a set view and they did nothing to verify the earlier visit but rather sought to damn and condemn.

The 'official' published report, dated November 2016, presented a litany of condemnations of the Robert Owen Academy and implied that the Academy had not moved forward from

the first Ofsted visit in May 2015. It provided the final catalyst to undermine the two Senior Leaders, who then lost motivation and drive.

## **Year 4 2016/2017 – Finance**

2016/17 saw the introduction of census-based funding, as opposed to estimates. This required the Trust to make significant further cost savings of £240K on top of those already made. A revised budget plan was submitted to the EFA detailing the saving, which would require the Trust to make additional redundancies. The Trust made every effort to preserve frontline services, to limit the adverse impact on student provision. All Senior Managers were subject to a 'voluntary' 10% reduction in salary in an attempt to support the school through its most financially difficult year, yet.

The Trust now needed to work towards a longer repayment period for the outstanding PNA clawback. It sent the EFA a revised proposal to make an initial repayment of 10%, and then a minimum of 15% each year, until funds were cleared. Again, this was neither accepted nor

rejected and no funds were repaid to the EFA. The Trust accepted the need to repay and had developed an action plan.

The Trust once again reminded the EFA that the circumstances it had faced since opening were unique, and that they had sought active support from the EFA to provide positive solutions to the ongoing development of the Academy. Furthermore, the EFA was reminded that no financial adjustment within the diseconomy funding had been made in respect of delays in the completion of the Academy building and the additional educational costs incurred with the removal of the first Principal. Off-site provision was required for two entire academic years, which resulted in additional staffing, placement and transport costs.

## **Year 5 2017/2018 – The End**

In the 'listening period' of autumn 2017, once again a MAT partner was sought. The link with South Gloucester and Stroud was the most appropriate offer – there was little time available and certainly not the amount of time set aside

*Business Units – Blackfriars Street*



for the first bid. The curriculum package was to reform the Robert Owen Academy into a University Technical College (UTC) and copy the successful model created at Berkeley Green, using several measurements this was a ‘win/win’ solution. It had the added advantage that, if UTC status was granted, the funding authorities would recoup their clawback.

However, once again it was not a matter of finance or academic integrity but sheer bloody mindedness on the part of senior civil servants, who had the temerity to contact the Chief Executive of South Gloucester and Stroud and issue a severe note of caution.

### May 2017 to August 2018 – Principal Three

For the start of the new 2017/18 academic year the school was fully staffed with good teachers in key subject areas. Evidence of this strength came with the fact that all teachers secured placements for the 18/19 academic year as the Robert Owen Academy announced its closure.

### Site

The Phase I roof was now leaking in most rooms. No additional funding had been made available for repairs, despite this being raised as an issue since the school opened. In December 2017, before the Trust was notified of the Academy’s

closure, a second CIF bid for extensive roof repair/replacement was submitted. Again, in April 2018, the Trust was informed that this had been unsuccessful.

### Year 4 2016/2017 – External Support and Inspection

**DfE Adviser: None**

### Ofsted: Two-day monitoring visit 6th – 7th February 2018

Since the previous inspection in the Autumn Term 2016, staff had been anticipating a monitoring visit by Ofsted, as per Ofsted’s policy of returning the following term to schools graded as inadequate.

Some four terms after the previous inspection, the Robert Owen Academy received an Ofsted Monitoring visit, this was perhaps the best HMI visit the Academy had. The HMI noted that the Robert Owen Academy was on a recovery track and observed good teaching and learning. The report was issued on, ironically, the same day that the Trust received notice that its funding agreement would be terminated on 31st August 2018.

**“Like many new things that are before their time, many people did not understand what the ROA was trying to achieve. It was radically different from what they knew and grew up with and, by default, it was viewed with suspicion. Some secondary school headteachers in the area were openly hostile and felt threatened by the school. Only those close to the school could see what was being achieved.”**

Anon

## Chapter 6: Governance

### Summary

*The chapter covers how the Governing Body was established and how it was structured and operated. It also contains a governor’s perspective on the successes of the Robert Owen Academy, as well as the lessons learned while being a member of the Governing Body.*

The essence of governance is aligning the school’s objectives with its goals, policies and procedures to ensure compliance with the legal and regulatory requirements of the United Kingdom and the European Union.

This school was approved under the Academies Act 2010. That Act removed powers from Local Education Authorities / Councils to open new schools and offered independent bodies the opportunity to provide broader parental choice and meet local needs through the opening of free schools and academies.

The Secretary of State for Education approved the Robert Owen Academies Trust (ROAT) application for a 14–19 Vocational School in July 2012. This approval gave recognition that the Trust was the contracting body and, therefore, directly accountable to that office for whole school performance. The Trust was registered by civil servants and had obtained Trust charitable status from the Charities Commission. Trustees were informed of these registrations but were not involved in the documentation.

During the application stage for this school, the Trust developed an eclectic network

of interested parties within the local and wider community, e.g. the business and services sectors, the voluntary and third sectors and parents. This informal network became the Stakeholder Board and had a consultative role on specific aspects of the school’s development. The Stakeholder Board included an officer of the Council, until that person moved employment. That representation was never replaced.

A Development Grant for essential preparations to open the school, including the recruitment of both students and staff, liaising with examination boards etc. was allocated to the Trust by the DfE.

### Development Year Challenges

Proposing to open or opening any new school is not without its challenges, whatever support structures are in place to provide advice and assistance. For a single academy such as Robert Owen, there was no support and only limited assistance in that initial year to develop concept into reality. During this period the then governance team faced numerous, difficult challenges.



One of the earlier governance challenges was dealing with the relentless hostility from various bodies, many of which had not raised any objections when consulted on the proposed school. Within governance there were concerns that much of this hostility was fuelled by repeated misleading information<sup>1</sup>.

The first major challenge faced by the governance team was during the Development Year and was to have a far-reaching impact. The proposal for an innovative school stimulated considerable interest from parents, students, staff and the wider community. As the Development Year progressed promisingly, the Trust sought confirmation from the DfE on the school's future funding. This would enable them to authorise both student and staff placements. Their enquiries were continually met with a standard verbal response, "it's entirely up to you". In governance terms this meant that if the Trust was foolish enough to risk offering staff employment and students placements without verified funding, they would be solely liable.<sup>2</sup>

The lack of verified funding for the school at a crucial time gave governance its first major setback. The school's Funding Agreement was not received until 13th August, for the school to open on 1st September 2013. The impact of the Department's commitment process was the loss of over 250 all-ability students plus staff, who had attended the Trust's Curriculum Conference and understood and welcomed the ethos of this innovative school.

At that time, the DfE and the Council were in negotiations over a site for the new school. Negotiations identified a former grammar

school site in the city centre. The DfE informed the Trust of its choice of the city centre site for the new school. For governance, this was an interesting outcome of negotiations for a school that was funded to open in September 2013. The Trust immediately informed the Department, and later its contractors, that the roof of the old school building had had, for many years, serious dilapidation issues. Wilmot Dixon, the building contractor, informed MACE, the main contractor, of the state of the old school roof, which had not been included in their brief. This information was unheeded by both the DfE and its main contractor.<sup>3</sup>

The Trust was faced with a choice to continue with this innovative pilot project or to refuse participation on the grounds of the impact of late funding. In addressing the way forward, the Trust was aware of:

- The volume of hostility towards the school and the extent of misleading information.
- The fact that late funding had lost the original potential 250 students and staff; having only a few weeks to recruit would have a long-term impact on the school's viability.
- The fact that the outcome of negotiations would mean that the school would be required to open in temporary premises and be located there for at least a year.
- The problems associated with opening and running a vocational school in a totally inappropriate, redundant, rural, Victorian primary school (ten miles from the city centre) with additional costs for lessons conducted in other venues and associated travel.
- Funding awarded in August 2013 was for a September 2013 opening.

- The Council's emerging and growing antagonism towards the school.
- The fact that the school was an innovative pilot project and may not be understood by all.

The Trust took the decision to continue with this innovative pilot project and opened the school on the 1st September 2013, in temporary premises, a redundant Victorian primary school. These premises were inadequate for the school's full educational needs, were ten miles from the city and there was low student recruitment. The school was intended to be an all-ability comprehensive, however, volumes of misleading information aligned to the loss of the initial potential students skewed intake, with the focus being on cohorts of students with complex needs. These factors impacted on budget, especially with enforced and unforeseen additional travel costs for students to and from the city and to outsourced lesson locations.

The Department acknowledged verbally that it was not the fault of the Trust that the school was located on an inappropriate site with very limited facilities, i.e. no ICT or vocational facilities. Despite this acknowledgement the Department insisted that all such costs were a Trust responsibility. The Department's attitude concerning the dilapidation issues on its chosen city centre site, and to the additional travel and education costs, did not go unnoticed within governance.

To maintain sound and effective governance, the Trust, as the accountable body, had the capacity to appoint (or dismiss) subsidiary bodies and delegate responsibilities to these bodies. In this capacity the Trust, prior to opening, appointed a Governing Body and allocated that body specific responsibilities to monitor on its behalf. In doing so, a two-tier governance structure was formed. The first Trust Chair was a former Principal of a Further Education (FE) College.



<sup>1</sup> Letters to Headteachers and Principals 11.08.2012; Time Line for Comments with Hereford Council 09.01.2012; Schools Curriculum Conference Group Responses 07.2012

<sup>2</sup> Schools Curriculum Conference Group Responses 07.2012; Briefing to Hereford Council on EFA Criteria 11.08.2012.

<sup>3</sup> Relevant Extract of meeting notes held between Wilmot Dixon and MACE

The initial Chair of the Governing Body was a former Vice-Principal of an FE College. On his retirement he was replaced by a prominent local business person.

The Trust and Governing Body both agreed that in order to ease pressures on the budget, all governance training would be achieved either by goodwill or by holding joint Trust and Governing Body meetings. Joint meetings facilitated the sharing of skills, knowledge and understanding within governance. The rationale for joint meetings was seen by Ofsted as a blurring of roles, and not as a financial necessity.

## Rounding the Circle

In September 2014, the school moved into its permanent site on Blackfriars Street in the city centre. Governance members noted that the site was home to a forerunner of their school. Between 1983 and 1988 it was a Technical and Vocational School 14-19. This school's uniqueness was that it had shared students with other schools. The students were on the rolls of their registered schools, where they studied academic subjects two days a week and attended the Technical Vocational School three days a week. They also had work experience with local employers and attended residential courses held on university campuses.

## New Site and New Problem for Governance

Governance was concerned that the former school building on the city centre site, with

its dilapidation issues, was inadequate for the needs of a school that provided an integrated academic and vocational curriculum. As part of the site development, a three-storey block of demountable units was installed to provide a modern learning environment that included vocational provision. The demountable units were the former Olympic Games catering block.

The new block was unfinished by the required date; quantities of key vocational equipment had yet to be installed, there were significant ICT problems, as can be expected with temporary premises, and there was a large snagging list for contractors to complete. This included ensuring disability access to the new block. It would be early summer 2014 before this building became available for educational use.

The former school building had a dilapidated roof, of which the DfE and EFA were aware. They failed to respond to any communications related to this problem. By now, the Trust was familiar with the difficulty of obtaining responses from the EFA. At the Trust's behest, a Capital Improvement Grant (CIF) application was submitted regarding the dilapidated roof along with an extract of meeting notes held between the building contractor and MACE, the DfE appointed project managers concerning the state of the roof. Full minutes of this meeting were never provided, only an extract relating to the roof was provided to the Business Manager by the building contractors. This extract confirmed that replacing the roof was not within the remit

for the building contractors and, as such, the builders had recommended that whoever took responsibility for the building, should have a substantial maintenance budget. i.e. a fund that a brand-new school would not have.

The grant application was rejected by the EFA. A subsequent application was also rejected, in April 2018. The notion of the possibility of invisible hands being at work began to emerge within governance.

During the beginning of the second year, the Trust was encouraged to bring forward staff appointments that were scheduled for later in the school's development and fund them out of monies set aside for Pupil Number Adjustment (PNA) repayment (clawback).<sup>4</sup> The Trust was advised that this was common practice in other academies. From the opening of the school, the Trust had insisted on good financial probity, ensuring that the PNA was banked separately from the operational budget. The Trust had trepidations about the Department's advice, however, operational needs necessitated the PNA banked finance being used to strengthen staff numbers in relation to an unperceived cohort of students with challenging needs. The Department's practice of conveying selected information verbally did not sit comfortably with the Trust.

## An Internal Review of Governance and an Ofsted Visit

To increase efficiencies within the school the Trust was keen to establish its own annual internal governance reviews. The Trust had concerns that within governance tiers there were inconsistencies in the transition to the new governance model. The Trust was also aware that for a cohort of students, achieving national educational standards would take longer due to:

- The results of entry baseline assessments.
- The lack of cooperation regarding the provision of student data, from a significant number of students' previous schools.
- Some of the cohort had a history of complex needs.
- Importantly, for examination preparation, students were only in this school for a short time, the Autumn and Spring Terms, before sitting exams in the Summer Term.
- The Governing Body reported concerns relating to the quality of teaching in two areas. During discussions on the Terms of Reference for the internal review of governance, an Ofsted Section 5 inspection was instigated. Much of Ofsted's report matched many of the areas identified for review by the Trust. In response to the Ofsted Report, and to an additional independent external review of governance, modifications were made to governance

**“As an SME employer in North Herefordshire, I was involved at an early stage in 2013 in the work of the Stakeholder Board. This was before the School opened. It seemed to me that we were making all the key decisions in our meetings and the Principal Designate made sure that decisions were made in ‘think tank’ settings. I could see a route into my specialist company for young people.”**

Anon

<sup>4</sup> Free-schools receive funding from the Education and Skills Funding Agency (ESFA). Funding is initially based on estimated student numbers for the September term, which is then followed by a school census in the Autumn. The census is used to identify actual student numbers. In the event of over-estimates any financial adjustments required are recovered via the Pupil Number Adjustment (PNA) process. This brief explanation excludes Pupil Premium etc. payments.



practices. Roles and responsibilities within the governance model were clearly defined within an in-house Governance Guide. In implementing a modified governance structure and responsibilities, inevitably, variations in individual progress occurred within the tiers of governance. For some colleagues this was a reflection that former familiar ways were deeply embedded and the occasional slipping back into familiar processes created minor problems.

A later Ofsted monitoring visit showed improvements had been made in many areas.

Governance noted that, under the 2010 Academies Act, schools under the Council's control decided to opt-out and become academies, unlike the Robert Owen Academy, which had brought inward investment of £10 million to the city's development zone. Those previously Council-run schools changed democratic ownership and accountability from a wider system to a narrow one and became responsible for paying market prices



Forestry skills - woodwork

for services previously provided by the Council. There was little public criticism of those schools. Yet this school continued to be subjected to hostility stimulated by misinformation. A Council prediction that this school would close other schools was, as expected, never realised. The continual adverse misinformation in the community had an impact on recruitment, the consequences of which were reflected in the implementation of more stringent financial controls.

Governance was concerned for cohorts of students coming to the school with poor educational histories; reasonable examination attainment in only two-terms of learning (autumn and spring) would not be without difficulties. The level of complex exigencies of a cohort of students, slow academic attainment, poor behaviour and attendance were constant concerns for the Governing Body. Staff undertook additional work and introduced schemes to change attitudes to learning. Many students rose to these challenges, however, that could not be said for all. Governors understood that with this cohort of students, their previous education experience was reflected in their entry baseline assessment and the subsequent level of attainment gained during their short time at this school. Some Ofsted Inspectors recognised this situation, whilst others did not.

### Making the School Work for its Students

Governors were aware that many students found this school's approach to their education much more amenable than their previous experiences. The integrated curriculum enabled them to gain confidence, hope and realise their potential. It was not uncommon for staff to receive appreciation from parents, who thanked them for giving them their child back. As a student-centred school both tiers of

governance were continually examining ways for current and future students to realise their potential.

The Governing Bodies, in seeking to benefit students both academically and socially, recommended the Trust extend Key Stage 4 to three years. This could be achieved by lowering the entry age to the school by a year. The then Regional Schools Commissioner (RSC) gave approval for the Trust to conduct a Community Consultation on lowering the school's entry age by a year. The results of the Community Consultation showed only two objections had been raised. All consultation results were presented to the RSC who, at this point, informed the Trust that permission to lower the school's entry age was outside his remit. The then RSC left that post to take a school headship. The Trust never received any formal or informal response from the DfE on this proposal. Governance members were pleased with one positive outcome of the consultative process; it had raised 26 requests from students seeking entry at the lower age, with numerous other requests being made in the following months and years.

In line with Government thinking, the Trust was also actively engaged in fulfilling its long-term intention to re-broker the school to a larger Multi-Academy Trust (MAT). A list of 11 MATs was reduced to a shortlist of two. These MATs offered to embrace the school's vocational ethos, meet local/regional economy needs and in doing so, enhance student employability. Both MATs were submitted to the then Regional Schools Commissioner. Both submissions were rejected. Within governance there was a view that amidst the civil service, input varied.

**As a student-centred school both tiers of governance were continually examining ways for current and future students to realise their potential.**

### Moving the Goalposts

Throughout governance there were concerns that changes in government offices often reflected differing stances on education provision. The DfE had accepted in the 2013 application, a slow and steady student growth rate over a number of years for this school. This was later ignored when the Trust was instructed to achieve the stated 2022 student growth rate by 2017. The school's Senior Leadership Team and governance were not aware of any change in government policy yet, overnight, previously agreed student recruitment targets had been abolished. Aligned to that, the EFA changed the ground rules for repayment of PNA clawback, which subsequently led to the issuing of a Financial Notice to Improve (FNTI). Within governance, concerns remained on the varied input from civil servants. Also, the Department's practice of conveying selected information verbally, did not sit comfortably with the Trust. An example of this was what would become the frequently used words, "Had the Council not been so opposed to the school, the Department could possibly have taken a longer-term view of the school".

In response to the impact of those aforementioned imposed changes, the Trust established a Task and Finish Group to seek strategic resolves, focused on taking the school forward. The Senior Leadership Team (SLT) model was agreed by both tiers in governance. The new model strengthened the SLT and subject areas of concern. It should be acknowledged that staff members made salary sacrifices in this exercise.

## A Further Ofsted Visit

Having set the strategic direction of the school, governance had a second Ofsted Section 5 Inspection. The result of this inspection showed that improvements had been made and the HMI, following consultation within the Ofsted system, stated 'Requires Improvement' as the outcome during feedback. In a matter of days a further (third) Ofsted Section 5 Inspection was conducted, the outcomes of which became evident to governance members before any feedback or announcement. Ofsted's justification for this further, or third inspection, within an incredibly short time of the second inspection was 'insufficient evidence to uphold the Requires Improvement outcome'. There was considerable consternation within governance as to how Ofsted, as an independent body, whether at national or regional level, could undermine the findings of a senior HMI and Ofsted's own internal systems to overturn the original inspection outcome. The extenuation for the additional inspection was given verbally by the Lead Inspector and no written evidence for the second inspection was ever produced.

Working to the Ofsted Report, and that of an independent external review of governance, minor adjustments were made within governance to optimise effectiveness. In 2017, an Ofsted monitoring visit reported progress had been made in most areas and the reported outcome was Requires Improvement.

## Funding is Withdrawn

At a similar time, the Trust received notification

that the Parliamentary Under Secretary of State for the School System would be withdrawing its funding from the 31st August 2018. This information was conveyed by letter via the Regional Schools Commissioner, who also sent letters of this decision to staff, parents, the Council and the MP for Hereford and South Herefordshire.

The Trust noted that the decision was to withdraw funding and not to close the school and, therefore, re-brokerage to a MAT remained an option. Once again, a shortlist was drawn up with preference going to the South Gloucester and Stroud Multi-Academy Trust. They not only met the philosophy requirements of the school but could also add educational value to the regional economy in the form of cyber security and social care. This proposal was submitted to the RSC and a civil servant.

At a similar time, given the Council's interest in the school site, the Trust put forward the notion of a land swap to the Council. That is, to exchange the city centre site with one on the Rotherwas Estate. One section of the Council failed to see the need for another form of education provision and, therefore, it went no further. Governance members felt that the future may well show the rationale behind the council's decision as alternatives were sought to cater for young people categorised as NEETS.

The Governing Body had numerous distractions including the adverse behaviour of a cohort of students and the building shortcomings that would not be resolved before closure. The way this school had been treated since opening did

nothing to dispel notions within governance that vocational education was not in vogue and that invisible hands were at work.

## Notice to Close

Whilst awaiting a response on its re-brokerage proposal from the RSC, the Trust received notification that the Parliamentary Under Secretary of State for Schools in addition to withdrawing funding, would close the school on 31st August 2018. The rationale for the closure decision appeared to be based on historic data. The decision made no reference to the recent Ofsted Monitoring Report or to the re-brokerage option. To the Trust, re-brokerage was the more financially prudent option to closure costs, especially as any PNA debt would have been absorbed within re-brokerage, staff would remain in employment, there would be no redundancy costs and the County would have had an outstanding educational asset. Once again, the Trust was verbally informed that, "had the Council not been so opposed to the school, the Department could possibly have taken a longer-term view of the school".

Threats of closure were not new to the Trust and Governing Body. The opening lines from the previous RSC on his first visit to the school were, "I've not come to close you, yet". Not long after, a civil servant who was new to vocational schools, informed trustees that he had submitted

a report recommending the closure of the school. On receipt of the closure notification, the Trust noted that the rationale for closure used by the Parliamentary Under Secretary of State for Schools in his closure letter was similar to that used previously by a civil servant.

Reviewing the situation, the Trust and Governing Body agreed to explore the merits of a Judicial Review (JR) on two fronts: a) the double Ofsted inspection and b) the rationale for closure. In their analysis, governance members, were aware of three points:

1. That a JR has the potential to reveal all communications concerning the school from a variety of bodies.
2. Loss of a JR could be expensive.
3. Even if the JR found against the Government or Ofsted's decisions, neither were under any obligation to change their original decision.

It was agreed that the start point for exploration would be a desktop review by a barrister. For this, the offer regarding external funding was received and accepted.

Following the Notice of Closure there were trepidations within governance on the likelihood of a smooth, seamless run down to closure. These forebodings were not without foundations, for example, some of the Trust and SLT's past experiences in communicating with

**"We were running a new community recreational organisation very much feeling our way into the market place but with a high demand for our services. When Chris Morgan came out to talk to us one evening about the potential benefit of the Robert Owen Academy facility for our work we had our eyes opened and our planning challenged. We felt that we were being invited to work and grow co-operatively with the support of a publicly funded body."**

Anon



**“Since that time the Trust and the Governing Body have been subjected to the most intense criticism and attack from all sides, some of which was anticipated but the intensity over six long years has been beyond belief. Privately, civil servants have admitted that it exceeded anything else they had seen anywhere in England. So where did this come from?”**

Anon

the DfE and the ESFA, plus the attitude of those education providers in the County who had expressed their antagonism towards Robert Owen Academy students. Within governance, members were always appreciative of the small number of schools that supported this initiative.

Readers can make up their own minds as to whether governance trepidations reflected the actual road to closure. It was interesting to note that the DfE and ESFA did communicate on the school closure. That, however, was in response to the Trust’s expressed concerns on the timescale taken on the closure budget and potential outcomes. Understandably, financial probity was a Trust focus, and delays in approving the closure budget had the potential to place the financial position of the Trust in jeopardy, especially should employment situations change. The *en bloc* resignation of the Trust in such a situation would have been an understandable action.

Initial closure discussions with the DfE indicated that after Easter 2018 all Year 10 students should have a seamless transfer to other schools to

support their GCSE examinations in the Summer Term. It was of no shock within governance when they learnt that, thanks to staff endeavours, just over a third of students had confirmed places in other schools; some were awaiting Herefordshire County Council (HCC) support and a small number had been referred to the In Year Fair Access Panel. One student application had been refused by a school that was under on its PNA. It was not until weekending 19th May 2018, that it was confirmed that all Year 10 students had been placed in other schools. Of those students, one third were placed in schools rated good or better by Ofsted, and two thirds were not. A small number of students of the latter group were placed in the Pupil Referral Unit, against the advice of the Principal. Governance members acknowledged that without staff taking students to potential recipient schools and identifying curriculum matches, students would have remained at the Robert Owen Academy until the end of the Summer Term; a point that the Council had keenly advised against. Two points were noted within governance:

1. That other schools were silent where money was concerned when transferring students from their school to the Robert Owen Academy.
2. In a communication, the Regional Schools Commissioner, supported by Lord Agnew, stated that there were sufficient schools in the county rated ‘good’ by Ofsted to accommodate Robert Owen Academy students. The truth of that statement was not reflected in reality.

Governance learnt from parents’ feedback that the Council had not been helpful. It did not go unnoticed that, under the Act, student transport costs are a local responsibility. That, however, did not stop the Council suggesting that transport costs for relocated students should be included in the closure budget. This factor led to ESFA questions and delays in

closure budget finalisation. There had been numerous comments in the community on the future of the Blackfriars site. The Council had aspirations for developing the site, the proposed university was a possibility. It was of no surprise within governance to learn that a delegation from the proposed university for the city would be visiting the site in May 2018. The proposed university was offered the opportunity to co-locate on this site with the Robert Owen Academy but chose not to. For governance that was unfortunate, as should NMiTE have taken over the site, the DfE might well have charged them for the demountable buildings etc.

## Conclusion

There was a view amongst governance that, unlike in Europe, within the DfE there is a lack of understanding as to the real values of vocational education. This opinion is based on current funding cuts at secondary and post-16 levels, industry and services concerned with the shortage of skilled labour and a government seeking ways to retain and attract skilled labour from other countries. This country, like any other, requires a skilled workforce.

The integration of academic and vocational studies provides students with an academic and practical basis for development. Vocational education as a bolt-on curriculum activity is not the best way forward.

Reflecting on the journey of this pilot project, governance members became acutely aware that support for Free Schools appeared to be changing, as evidenced by the initial setback of the late funding agreement, opening in inadequate temporary accommodation, the attitude of the Council to the school, moving to an unfinished school site, providing education in a building with known high levels of dilapidation, and refusals for aid to rectify the dilapidation, moving the agreed recruitment targets forward several years and hostility from the Council and other providers. In some ways, this journey could be the result of changing attitudes to vocational education/ Free Schools in government, silo mentalities within government departments, mysterious hidden hands at work or any combination of the aforementioned.

*Fundraising - Christmas market*



# Chapter 7:

## Final Summaries

### Summary

*This chapter attempts to offer the reader our collective view of where we tripped up – due either to external pressures or our own naivety.*

### Ofsted

It would be easy to blame Ofsted for its lack of support and claim that all it could do was offer destruction and no constructive dialogue. However, in its defence it may be argued that it is simply measuring quality at a given point and ensuring value for money for the tax payer. Our plea throughout all the visits was simple, 'only connect'.

The true nature of the Robert Owen Academy was never really understood as a school delivering something innovative and unique. The Academy was not simply another standard secondary school, but a new type of school specifically designed to break the mould; to reach out and to make a difference to the lives of those that others had rejected and could/would not educate. The Robert Owen Academy was designed to add value in a vocational sense – all too often our mission was bypassed and our credibility questioned. This pioneering school

did not fit the Ofsted Inspection Framework. Ofsted never acknowledged the need for time to develop – all it could do was criticise and depart. The two-part inspection in the Autumn Term 2016 was seen to be an agenda to fail being driven from elsewhere.

### Education Advisers

We had three designated Education Advisers during the six-year life of the Academy:

- Adviser One during the Development Year, but access was only allowed via the link civil servant in the Department for Education.
- Adviser Two in the first year of operation through to the appointment of Principal Two.
- Adviser Three from the end of the first year of operation through to the closure decision.

The role of the Education Adviser was never clear and, although they had a stated brief to support us to become operational and prepare

for Ofsted, the short reporting link back to the Minister was always openly acknowledged.

Advisers advise – Ministers decide; if it was Ofsted's role to get out its camera and take a snapshot then it was Educational Advisers who should have been there for the long run – and if any had to be replaced, each new source of sagacity had to be familiar with the ethos and aims of the school.

### Blocked Income Opportunities

This was key and an area where we had detailed planning in place to create new business and income streams. Unsure school leaders far too often sought permission from the ESFA for permission to progress new identified business income streams and on all occasions, permission was not given on the basis that the school was not achieving its Ofsted targets. With hindsight, link civil servants should have been given a brief to be more entrepreneurial in their approach to us. We had strategies but we were blocked from using them.

Key strategic plans blocked by government colleagues/departments, where support in just one of the areas below would have changed the future of the Robert Owen Academy:

- Lowering the age range by one year to a Year 9 entry.
- Joining the ESAT MAT and forming a healthcare and medical training site in Hereford city.
- Joining the SGSC MAT and offering cyber security.
- Sub-contracting VLUK to deliver BTEC Diplomas and core subjects to professional sports teams across the region.
- Being a green energy provider.

### Poor Publicity

Marketing is pure selling of the product to achieve maximum sales, whereas PR or good PR, sends out a positive message about the organisation and defends and mends any adverse media and image. However, the two are closely related, for without positive PR the market attraction is restricted.

Residential activity



**“For us as primary school teachers the excitement was the possibility of working together with Mike Carter at KS2 on new ways to broaden the primary school curriculum, which would later lead to a 14-19 choice of enhanced life skills for our children.”**

Anon



The Robert Owen Academy's marketing activities set off in a very positive manner but were progressively weakened by a series of events, including open hostility from local schools, the Local Authority and local press. It did not become the first choice for those embarking on a vocational pathway but the only choice for those pupils and parents who had the local PRU as the only tangible alternative – which ran on a two-and-a-half-day week, half that of the Robert Owen Academy with less academic and virtually no vocational offer. Thus, a limited marketplace became the result and it is a hard position to overcome in a competitive educational marketplace, where there are more school places than school children.

### Weak Community Links

A school thrives when it has the support and engagement of the wider community. Again, this was evident from the outset but fell by the wayside as the mission and vision were lost in a short period of time – many of the employer base understood the ethos and aims of the school, but a lack of dialogue killed off that positive start. This point links in very much with the co-operative school dimension being allowed to slide.

### Progress Towards Joining a MAT

MATs were offered as panaceas for educational providers with the aim of constructively

amalgamating and sharing good practice. The ethos of the Robert Owen Academy was to cooperate and work collectively; it is in its DNA, hence the push by the RSC for the Robert Owen Academy to join a MAT was met with open arms by the Trust, the Governing Body and the staff. However, progress towards this was constantly undermined, not out of concern over the Trust's choice of MAT, but of a desire by others to undermine the advancement of vocational education.

### Role of Regional Skills Commissioners

We felt that the first RSC came with a pre-agreed agenda. His opening remark, "I haven't come to close you today but to learn more about you" was consistent with the threatening line that the Department adopted from the start. We struggled to help the first RSC to understand the unique purpose of the Robert Owen Academy and to challenge his mental model of the Academy as a bog-standard comprehensive school. We didn't win this battle and his constant default position to micromanagement of our operational challenges did not help to encourage Principal Two to continue in the face of adversity. We believed, rightly or wrongly, that when the first RSC departed, the role his successor inherited was, in a sense, a 'done deal'. The second RSC was more sympathetic and more inclined to listen, but we felt that we were one of many problems across her desk and, stuck

out in the far reaches of the West Midlands, the easiest solution was to recommend closure to the Minister.

### Civil Service

The core issue with links with the Civil Service was the inconsistency in personnel and then the inconsistent advice, e.g. from being told to spend the Robert Owen Academy income to the full to being reprimanded for doing so.

The challenge for Free Schools was, in our opinion, one of management and trust. The whole Free Schools initiative was pushed through by a Secretary of State with a zeal and enthusiasm for a change in the big picture. There seemed to have been little thought in the Department as to how to nurture these innovative and embryonic projects, with many having great potential to offer models of change for the benefit of children and young people. The allocation of a link civil servant during the Development Year was sensible and successful. The link civil servant provided a conduit into the wider Department and proved invaluable to the early work of the Trust. Once the Funding Agreement had been agreed, the link civil servant faded away and the Trust was presented with a veritable montage of ever-changing faces from the Department, the ESFA, Ofsted and the RSC. It seemed that there was no continuity of information and communication and new faces asserted that they had no prior knowledge of previous agreements. This seemed to be set in a context of fear of the reaction from Ministers.

Candidly, in such a feverish atmosphere, the unique Robert Owen Academy was never

going to grow and flourish. The constant off-field message that we were on borrowed time, that the new university in Hereford wanted the site and the fact that the Local Authority remained hostile to our continuation became demoralising and destabilising.

### Staffing

Despite the fact that the ROA closed with a very strong, devoted team of staff, it never really recovered from the inability to recruit high quality permanent staff to open this new school, given that the Funding Agreement was issued only nine working days before the school was set to open. This, combined with the extreme late entry of some students (Year 11, term two) and the lack of school attendance of some for many years, meant that key academic staff were perpetually chasing their tails when it came to academic

achievement as evidenced by GCSE examination results. Cold data drawn upon for inspection purposes did not accurately reflect the positive impact teaching staff had on students' attainment, in the short time they had together. Schools had failed our students and we were often judged after they had been in our Academy for one term.

### Lack of Definition of Function and Purpose of the Academy

In many senses this hurdle was never fully overcome. The wider community never understood the ethos and scope of the Robert Owen Academy; it was seen by the business community at the outset but the Local Authority and the wider educational

**"I am sad that this project was closed down before it had a chance to get off the ground. There was little doubt in my mind, and those around me, that it would bring much needed benefit to our local communities and their young people."**

Anon



establishment (both locally and nationally) never understood the remit. As such, it was viewed by the many as simply another secondary school – and in its later stages as a type of alternative provision (AP), which was a stage below the PRU. It is here where the activities of good publicity could have spread clarity regarding the role of the Robert Owen Academy and its educational ethos and scope.

### Co-operative School Dimension Allowed to Slide

The co-operative school dimension had two aspects. Firstly, the link with the Co-operative Movement nationally, with its associated network of schools, although this was never nurtured and followed by the Senior Leaders of the schools. Secondly, the co-operative dimension in a local context. It was the aim that the school would never be a competitor for local schools but complement them and serve to educate those with a vocational talent. In addition, the Academy was to be owned by its community through the Stakeholder

Board. As such, cooperation here was aimed at encompassing both the sharing of resources and staff to produce the best outcomes for the wider community. This, again, was never an avenue that was developed.

### Governance

From the beginning, there seemed to be confusion in the minds of Department officials, when it came to an understanding of the roles of the Trust and the Governing Body when applied to local and regional schools. The first Chair of the Trust likened the role of the Trust to many elements of a traditional Local Education Authority (LEA), whilst the Governing Body monitored the work of the Academy on behalf of the Trust. This proved to be a helpful working definition.

In the first and second years, these two key bodies held joint meetings to help with the continuity of decision making, however, this model was not liked by Ofsted Inspectors, who reported that it led to confusion and a lack of definition of roles. In order to address this, two moves were implemented:

- Creation of a Strategic Committee of Chair and Vice-Chairs of the Trust and Governing Body.
- Separate meetings of the Trust and Governing Body.

Others will judge whether our approach was helpful in managing the challenges going forward.

### Stakeholder Board Not Developed

After a positive start obtaining the engagement of local businesses during the Development Stage, momentum was lost in Year One, and was not reinvigorated. This was detrimental to the heart of this unique proposal.

**“The governance structures were set out in the original proposal but how they would work was a master class in evolution. We drew heavily on those colleagues with experience in retail co-operatives and, through painstaking review and planning, we began to build accountability structures fit for purpose. Our external evaluations told us this.”**

Anon

### Summary of our Lost Battles

Since its inception in 2012, the Robert Owen Academy fought all the way to the final withdrawal of funding on 31st August 2018.

The battles the Robert Owen Academy lost can be summarised as:

- Battle to appoint its desired first Principal.
- Battle to have the school recognised in the wider community.
- Battle for support from the Local Authority.
- Battle for being allowed to join a MAT.
- Battle for Ofsted to recognise the vocational aspect of the Robert Owen Academy.
- Battle for Ofsted to recognise low number data sets on validity of percentage-based data.
- Battle to gain clear, cohesive and constructive advice from appointed educational advisers.
- Battle with the RSC to understand the unique nature and purpose of the Academy.
- Battle to overcome the constant message that the site was needed for the new university.
- Battle to achieve an understanding in the ESFA that we had a model for achieving a balanced budget and payback within a short time frame.
- Battle to persuade the staff of the embryonic new Herefordshire University to meet with us and to explore a symbiotic partnership, which would have provided a pipeline of future students for them.

- Battle to move the civil servants, with the power of closure, from a tick box mentality to one where children matter.
- Battle to achieve an understanding in the Local Authority of the scale and nature of disaffection amongst Herefordshire young people.

### Evaluation and Reflections

1. Were the aims of the school out of step with either the needs of the economy or society? **NO**
2. Was the ambition self-gain or politically motivated? **NO**
3. Were the aims of the school at odds with the ideas of all mainstream political parties? **NO**
4. Was the school given enough time and support from the RSC and DfE? **NO**
5. Was Ofsted supportive in its visits? **NO**
6. Did the school ever refuse entry to those who had been treated badly in their former schools? **NO**
7. Was the school supported in its mission by the Local Authority? **NO**

And some YES responses to questions:

1. Should vocational qualifications have parity of esteem with academic ones? **YES**
2. Did we make a positive difference to the students who came to the Academy? **YES**



# Chapter 8: The Hard Lessons Learned

For anyone undertaking such a project in the future, we would recommend paying close attention to local politics and being highly proactive in terms of marketing and PR in order to maintain a strong public profile. Our hard lessons learned include:

## 1. Local Authority Hostility

The decision to open the Academy, despite known hostility from the Local Authority, demonstrated a complete underestimation of exactly how harrowing and damaging this could prove to be.

The need for greater awareness of local politics and an awareness of the need to engage far more quickly with those who were against the project from the outset.

## 2. Public Relations, Marketing and Publicity

Higher levels of resources should have been allocated earlier in the project, both budgetary and experiential.

Having an experienced PR presence earlier in the process would have helped alleviate

the malicious misinformation fed to the local community, replacing it with more positive, factual information publicising the benefits of this type of education for the region's young people. This may, in turn, have had a positive impact on relations with the Local Authority and some local headteachers.

## 3. Opening too Early

The pressured decision to open the Academy before appropriate facilities were available to deliver the innovative curriculum.

## 4. DfE / ESFA

The DfE/ESFA blocked the Trust's proposals to rectify the financial struggles the school was experiencing; proposals included lowering the admission age to 13, joining a MAT, sub-contracting some provision, a change in designation and application to be an apprenticeship provider for the 14-19 age range. Our country is not yet in a position to embrace the significance of a school such as the Robert Owen Academy, unlike the more enlightened approach to education of our European neighbours.

**“Without doubt Herefordshire was the wrong location for this pioneering venture. The County has become a trademark for resistance to change. History would indicate that this has been so for some time.”**

*Local Business Person*



# Chapter 9:

## If We Had A Time Machine...

If we were doing it all again, we would give ourselves the following advice:

### Proactivity

- Be more aware of the local politics and engage far more quickly with those who are against the project from the outset.
- Work on Free School Projects with the DfE.
- Develop strategies for dealing with people with silo and tick box mentalities.
- Don't assume that visiting civil servants will have read the approved application.
- Civil servants' input can be varied.
- Understand there will be inconsistent advice.
- Confirm civil servants' verbal comments, suggestions, advice in writing, immediately.
- Never assume government departments talk to each other.
- Never assume there will be a honeymoon period.
- Never assume that officials understand what you have set out to achieve.

- Constantly remind civil servants of the action plan.
- Keep abreast of changing government agendas.
- Do not assume joined-up thinking in Whitehall.
- The history of this school reflects the characteristics of a school caught between conflicting views of education provision within government and its departments.

### Spreading the Message of Change and Innovation

- Identify marketing priorities at a very early stage.
- Understand the differences between marketing and public relations activities.
- In a competitive environment you are never short of enemies, rise above them through excellence and good public relations.
- Develop and maintain a positive public relations profile.

**“In common with many modern co-operators we had a collective dream that one day we would achieve a genuinely mutual model of community ownership of schools. In our vision, schools would be owned by their communities in partnership with their teachers and parents. The Robert Owen Academy gave us this radical model for the twenty first century. Sadly, Herefordshire Council and a critical number of local schools chose splendid isolationism and protectionism.”**

*Free School Proposal Development Team member*

- Marketing should be a priority from Day One.
- Manage external relations tightly and effectively.
- Counteract negative messages immediately.
- Keep your friends close to you.
- Identify your enemies and make a plan.
- Considering this school's developmental background, it achieved far more with young people with previously poor educational experiences than those schools in the county that had rejected and referred them to the Robert Owen Academy.

### Governance

- Structure for clarity in roles, responsibilities and demarcation lines.
- The essence of governance is accountability – meet regularly and communicate effectively.
- Ensure everyone knows their role through effective induction and training.
- Put governance in place from the start, with clear roles, responsibilities and work streams.
- Ensure the Trust and Governing Body are separate and keep the communication lines open.
- Be clear where the buck stops.
- Be strong, determined and confident in your mission and transparent in all your dealings.
- Be innovative.
- Whatever the problem spotted by external inspections, the buck stops with the Trust, for they are accountable for whole school activity.

### Staffing

- Skills shortages in key subject areas create problems in terms of staff recruitment; ensure budget commitments can

- accommodate flexibility when required.
- Go for the best and don't put up with filling holes.
- Appoint staff who are dedicated to the project.
- Explore secondments as a means of bringing in high-quality personnel and linking with other establishments.
- Establish accountability at an early stage.
- Set up clear and transparent staff appraisal processes.
- Provide external mentoring for the school leaders.

### External Relations

- Learn from the football clubs, especially why people support them.
- Being a part of the community requires work and commitment.
- Identify whether it is the entire Council or just individuals that oppose you and target accordingly.
- Develop the external links early on with a partner university, examination boards, foreign links, community organisations etc.
- Given the Council had lost a number of schools under its control to independent trusts, its asperity to the Robert Owen Academy remains open to conjecture.

### Ofsted

- Tick the boxes before they do.
- Inspectors will vary, some will understand your endeavours, and others are only interested in ticking boxes. Challenge when you know you are right.
- Remove obstacles to progress.
- Be proactive in your dealings – get off the back foot.
- Be brave and confident in the vision.
- Let the inspectors know that you are prepared to challenge judgements.



- Make sure that staff are well briefed.
- Develop quality kite marks such as ISO9001 and Investors in People.
- Recognise that inspector input will be varied.

### Funding Agencies

- When dealing with funding agency personnel, identify their management structure, this could save a great deal of time and frustration should communication difficulties then be experienced.
- Have clear and agreed budgets.
- After meetings, send out your organisation's view of what has been agreed.
- Do not tolerate poor communications.
- Be brave and confident and don't be dissuaded from making formal complaints.
- Make sure that funding officers understand your challenges and that change is expensive.
- Recognise that civil servant input will be varied.

Student Artwork



### Buildings

- Obtain professional advice e.g. a building surveyor, don't assume buildings are sound.
- Make sure that what is on offer fits the original bid and is fit for purpose.
- Commission your own building evaluation.
- Carry out a risk assessment.

### Politics

- Maintain good relationships where possible.
- Keep alongside your MPs and make sure that they understand your mission and your challenges.
- Hold regular briefings with local politicians.
- Invite Ministers to the school when you have something to promote or points to make.

### Looking Over the Hill

- Keep in step with government changes in policies and practices.
- Know your destination and plan strategically for it.
- Link with a MAT at an early stage.
- Establish an evaluation process from Day One, which includes self-auditing.
- Plan from Day One for replication and consolidation.

Although it is sad that we are where we are now, the battle may have been lost but the war will be won. Our theme and message for the future is simple, the lessons we have learned and the scars that we bear are a starting point for others embarking on the 14-19 technical and vocational education journey.

## Chapter 10: Reflections

### Summary

*The following are the reflections, observations and opinions of some of the people involved in the Robert Owen Academy's journey.*

### Why I became involved – Second Chair of Governors

*I originally got involved with the ROA because I could immediately see that what they were trying to do was have a syllabus that helped to enable young people to develop 'life' skills – the same skills that I, and many other employers, were looking for in job candidates. As an employer, I am happy to train people in the job specific skills that they need for the role, however, I do expect a certain level of communication skills, thinking skills (deductive reasoning, lateral thinking, critical thinking), problem solving, resilience, self-reliance and empathy.*

*I have noticed there is a change in the way we impart knowledge to young people between junior school and secondary school. In junior school, work is done in groups often sat around a table with interaction encouraged, while the teacher goes*

*from one table to another. Once at secondary school, students all sit facing the front, there is little collaborative working and they are encouraged to speak only when asked a direct question. Unfortunately, this method of teaching doesn't develop the employability skills (life skills) that people need. This, alongside the reduction in the teaching of drama and music, means that young learners no longer have the opportunity to develop these essential skills in school. At the same time, family sizes have reduced and there is less face-to-face interaction as a result of the rise in the use of social media.*

*The ROA recognised, from the research they had conducted with employers, that there was a need to develop a curriculum that incorporated opportunities for learners to obtain and hone employability skills. The ROA managed this through a mix of vocational and academic subjects, which*

**“Every student application or plea to join the Robert Owen Academy was carefully weighed and considered and all reasonable steps were taken not to turn anyone away. The appreciation from parents at their wits' end has been humbling. We have all shed many genuine tears.”**

*Robert Owen Academy Member of Staff*

also applied knowledge learnt. While undertaking the planting of a flower bed it was necessary to be able to peg out the right size and shape for the bed and calculate the correct amount of seed, then write up the observations and learning points. When making bird boxes, designs were made, plans drawn up and measurements made to make sure everything would fit together, once assembled. During these sessions, learners were encouraged to discuss their ideas with each other and learn from one another, thus developing their communication and negotiation skills. The teachers we engaged were brilliant; taking on board the change in teaching style, they saw very quickly the positive change in the behaviour of the learners.

Like many new things that are before their time, many people did not understand what the ROA was trying to achieve. It was radically different from what they knew and grew up with and, by default, it was viewed with suspicion. Some secondary school head teachers in the area were openly hostile and felt threatened by the school. Only those close to the school could see what was being achieved. Every time we successfully managed to get doubters to visit the school and show them around, we were able to change their minds about the school, however, this was a slow process and some people just refused to come and see what great things we were doing.

**“Robert Owen believed that character could be formed under favourable, structured and relevant conditions. These processes would, in turn, lead to the building of communities equipped to face the changing world. So it was to be with the Robert Owen Academy in Hereford. Young people, in a short time, were given a choice of an alternative vocational curriculum integrated with the necessary academic building blocks. In five years, a significant number of young people had their lives turned around as they were shown that they were not failures but citizens with amazing skills and talents”.**

Stakeholder

In retrospect, if I were starting this project from scratch today, I would use more of our meagre budget on marketing and advertising in an effort to convince more people more quickly. Any change can be a slow process, we needed to engage more secondary head teachers early on as well as convince the Education Department of our local Council that there was nothing to fear and everything to gain from our bold curriculum.

## **Acting Principal – In his own words**

### **The set-up stage and early days**

A lengthy and detailed bid was submitted to the Department that set out the vision, values, objectives and operational processes for the intended school. After a series of reviews and meetings this bid received the go-ahead from the Minister. From Day One it was clear that the school champions were not going to be allowed to implement their vision and that political priorities, rather than the needs of students and the community, were to be the key drivers.

EFA Education Advisers made it crystal-clear that the vision of the school, as per the accepted proposal, was a low priority and that they, “Wanted the school to focus on the basics for the first few years” and

then, “the fluffy things could come later.” The first and second EFA-appointed Education Advisers led the negative process of taking the side of the Principal against the Governing Body and backing the growth of a crisis situation that finally came to a head when the first Principal left in the Spring Term 2014. As an emergency measure, the Governing Body appointed an interim Principal and began the process of recruiting a permanent Principal. This process was to take several months, and the negative press damaged the recruitment process.

### **Recruitment**

Having sought premises, the school was provided with inadequate accommodation that raised recruitment and safeguarding issues from Day One. The most important impact of this decision was to cut the opening roll significantly as parents opted not to take up places at such a remote location. The school team engaged in numerous channels of direct recruitment, including the use of social and traditional media, open days and direct marketing. It was reported that local schools actively campaigned against the ROA and denied the ROA access to their students and destroyed letters and marketing materials sent by the ROA aimed at the ROA’s target market.

The concept and ethos of the school was supported by more than 300 local businesses and through these businesses, contacts were made, and recruitment progressed. The active opposition of some local politicians, headteachers and vocal community members detracted from the recruitment process, further reducing the student intake.

### **Governance**

The governance arrangements of the ROA were framed with the best intentions and designed to engage with the community in an open and transparent way. There were initial issues around understanding responsibilities and these did make



the task of governing the school more difficult than it needed to be. There was a successful phase of joint meetings that added significant value to the process. The mix of people on the governing bodies of the ROA had a greater level of educational, business and community experience than would be found in most established schools but, for many, the ROA was their first experience of dealing with the Ofsted operating environment and they found themselves on a very steep learning curve. This often detracted from their ability to engage effectively with the process of governance. Given that they were not able to engage with other schools there was no opportunity to build their knowledge in a collaborative way. My view is that this had a significant, negative impact on the governance of the school. Tight budgets impacted heavily on governors’ roles, which became operational rather than strategic.



## Local Schools

From the beginning, local state schools opposed the creation of the new school. Once it was given the go-ahead, headteachers actively campaigned against it in their schools and in the community. There was a co-ordinated campaign to ensure that students who would have benefitted from the ROA curriculum were prevented from meeting with ROA staff; parents were actively discouraged from engagement and meetings of headteachers apparently took un-minuted decisions to the detriment of the ROA.

To add to an already febrile environment, schools cynically attempted to “unload” students they saw as problematical, particularly those with SEND and who had diagnosed and undiagnosed behavioural issues. These students often came with recommendations that were at best generous and at worst concealed important issues. Parents reported that their decisions not to send their child to the ROA were often based on headteacher scare stories,

promises of additional learning support that until then had been withheld for years, and even gifts of equipment such as tablets and laptops. Schools took up to 13 months to send student records to the ROA, leaving little for the school to plan with except their own observations and the limited views of parents. In short, local schools conspired to make the ROA a “dumping ground” for students who had failed or been failed for most of their educational career.

## Students

There are three measures that I can use to describe the progress that students made.

## A. Parental reports

For many parents the ROA was both a beacon of hope and a last resort. Their children may have been to several different schools during their career, have been excluded (temporarily and/or permanently), have been dumped in special needs units or simply have gone under the radar in schools for years. At the ROA these students received a level of support and guidance that they had not experienced hitherto during their academic career. Parents reported a level of communication and target setting that their children had never had before. As a consequence parents reported:

**The school was provided with inadequate accommodation that raised recruitment and safeguarding issues from Day One. The most important impact of this decision was to cut the opening roll significantly.**

“You have given me my son back, he has a renewed interest in everything around him and is talking to us again.”

“My daughter has found a niche and is studying in a way she has not done in ten, long years.”

“My child had been written off by his previous school. You have helped him to see what is possible.”

“The work done by Mr X and Miss Y has given my son back his self-respect and a sense of the opportunities open to him.”

## B. Student progress

I observed students strongly improving reading and mathematical abilities, enhancing their communication and problem-solving skills, learning to work with others in collaborative ways and developing an understanding of the world of work.

## C. Added value

Many of the students came from rural areas.

As a consequence, many had very limited, if any, experience beyond county borders. During their time at the ROA they experienced added value to their studies through:

- Work experience with the ROA’s business and community supporters.
- Engagement with Italian interns.
- External visits to Oxford University, participating in a competition at Birmingham NEC, rural and tourism studies in Oxfordshire and in county.
- Organising school fetes and recruitment events.
- Acting as advocates for the school at events.

## Principal Two – In his own words

### Lessons to be learned

There is no doubt that the passion and vision behind the Academy was well-founded and secure in its rationale, however, in hindsight, some key points for future developments must be considered.

### 1. Clarity of designation within the current education framework

Perhaps the biggest single factor in the ultimate closure of the Academy is one of designation. Whilst there is a disjoint between the inspection

framework and the educational goal of Free Schools, setting out a clear designation that allows for students and, ultimately, the school to succeed is essential. A curriculum which necessitates a range of ‘trade-approved’ qualifications is likely to always sit outside the mainstream progress agenda. As a consequence, valuable experiences and skills learnt by students will not generate the recognition required to meet floor targets and will place the Academy in a no-win situation.

As the Academy grew a positive reputation in some quarters, most notably within families of SEND learners, recruitment of high-needs learners became the norm. As a school with capacity, learners with these needs could not be refused entry but, in turn, required more specialised teaching and support and consequently more budget. Ongoing discussions around potential clawback of numbers-based funding ensured that funding, which could have been used to support learner outcomes, was ring-fenced and inaccessible. No clear direction from the RSC, EFA or DfE on timeframes for recovery of these ring-fenced funds meant that financial planning was almost impossible and that learner experiences were hampered. Money could have been used to impact on results but the failure of the EFA to agree plans for this perhaps demonstrated a willingness to see the school wither.

**“The key question which stubbornly remains unanswered is why, if the new university (NMI TE), promoted by the MP for Hereford South, so desperately wanted the Robert Owen Academy site, ways were not found for the two establishments to work together. We understand that the Robert Owen Academy Trustees offered a co-location proposal but it was rejected. A massive lost opportunity for our children, which we fear had its origins in political opportunity”.**

Anon

## 2. More haste – less speed

The decision to open early in accommodation with limited facilities and inexperienced staff created a perception locally that this was a ‘special’ school. This was certainly not helped by the Department’s involvement in pressing for an early opening and in a ‘guided choice’ of initial Principal with a background in special education. Initial documentation inadvertently promoted this idea further, with an emphasis on an ‘overalls and woodcraft’ approach to the detriment of a core academic curriculum, which had always been in the visioning documents.

## 3. Local Authority support

The likelihood of the school succeeding was significantly hampered by a Local Authority that failed to see the benefits the Academy could offer. In part, this may have been down to individual personalities, however, the lack of a strategic acceptance of free schools as a future model to support the development of learning across Herefordshire was short-sighted, to say the least. Embedding the Academy within existing structures

**“It is difficult to understand why all the Robert Owen Academy’s leading edge ideas for economic and social re-generation were squashed at local level time and time again. It would appear that the local council just didn’t want projects which would bring inward investment, create opportunities for our young people and help to support the Herefordshire business community.”**

Chris Morgan, Second Chair of Trust

could have been achieved at any number of points over the previous four years given any desire on the part of the Local Authority to embrace change. The conflicting interests around a local university and its possible location appears, in no small part, to have been on the political agenda from an early stage.

## 4. Quality, quality, quality!

Linked closely to point two, the need to appoint staff to open at the earliest opportunity created a situation that, on reflection, was clearly likely to occur. It is widely accepted that, in general, staff looking for positions late on in the summer term or during the summer vacation may not always be of the highest quality. Schools need teachers and, once the guided decision to open ‘early’ was taken, recruitment of high-quality staff to a new school in temporary accommodation was always going to be a challenge. Despite the best efforts of Managers, Trustees and Governors, ineffective teaching was evident from Day One leading to further negative opinion and adverse publicity. In rural communities, perhaps more so than inner city schools, word of mouth and the local rumour mill can make or break new providers.

## 5. Re-brokerage

The option to re-broker support for the Academy has been extensively explored and, at every turn, blocked by Regional Commissioners across the country. The long-term viability of the Academy necessitated re-brokerage, a concept agreed by all from an early stage, however, no viable partners were able to satisfy Commissioners of their capacity. There can be no doubt that the geographical status of Herefordshire had an impact on this. No large-scale, Multi-Academy Trusts (MATs) exist in the county outside diocesan control, thus necessitating significant travel and time commitment from potential partners. Evidence indicates that geographical MATs, or clusters within MATs, are

the most effective in driving up standards. It is likely that this led to uncertainty and reluctance from Regional Commissioners to consider options from further afield, thus reducing the availability of potential partners considerably.

To conclude, there is no doubt that the Robert Owen Academy is not alone in falling foul of a lack of coherence in the Free School programme. Whilst some have undoubtedly flourished, these have almost always been as parts of existing schools or colleges and rarely as stand-alone entities. The programme is based around sound principles, however, a lack of strategic planning on location in relation to surplus capacity, Local Authority engagement and the capacity for support has meant that the positive experiences for learners have been too short-lived. Whilst mistakes have been made, fundamentally, several young people in Herefordshire have been able to achieve far greater things through the school than was ever thought possible of them.

## Principal Three – In his own words

**‘Do not mourn the ashes  
– fan the flame’**

This account covers my work and wider support for the Robert Owen Academy from its conceptual years. I remain convinced that its aims and the overall vision of the school provided insight and innovation both to support a wide, local community and deliver a type of educational provision which has tremendous synergy with all political creeds and the current economic needs of our modern society. As such, it was in tune with so many educational and economic indicators.

However, as the saying goes, ‘It takes a village to rear a child’.

By the same token, it takes a community to foster and support a school. It will not be an instant success – and in its early years it will be in need of most support. The forces of the status quo continually undermined the project and engineered the closure, and the inspiring idea was never given the oxygen to prosper. The hope from my message is that although the principles were sound, others failed to support this innovation in the end process and so a lifeline for many was lost. However, my role must be to pass on the baton to others who will follow this unique experience and continue to fight for what is educationally correct, although many may not see the obvious benefits. This song is over, but the melody lingers on.

## You Never Set Foot in the Same River Twice

I had always thought that the term ‘you never set foot in the same river twice’ was an old Chinese proverb, however, when at a teaching conference and I used the term a colleague, who was

Greek, claimed that it had originated in Greece and defended the position robustly. No matter where the term originates, this sentiment permeates my reflections on the voyage of the Robert Owen Academy. This comes from the perspective of my engagement with the school at various points of its development and during its operation.

In brief, I witnessed an engaged and enthusiastic set of ‘founding parents’ coupled with an engaged community. I obviously attended start-up meetings with key stakeholders, then I applied for and was interviewed for the position of the first Principal in spring 2013. I was involved with the school in supporting the provision of its vocational offer

**The overall vision of the school provided insight and innovation both to support a wide, local community and deliver a type of educational provision which has tremendous synergy with all political creeds.**



(engineering) from my position as a manager in an FE College. I returned to the Academy after it had had two Ofsted inspections in the autumn of 2016. I then took up the position of Executive Principal from 1st May 2017. Hence, I have several ‘snapshots’ along the journey taken by the ROA, starting with the energy and vision of the Trust in setting out the scope and ethos of the school from its inception.

When asked what I did for a living I liked to reply that ‘I help to change people’s lives’, thus, to an extent the aims which the original founders had for the school were noble, practical and, in many senses, visionary. What is more, they offered life-changing opportunities to those with vocational talent who often did not get a good return or value-for-money from the current educational system; young people who had ability but were sidelined as schools pushed exclusively an academic path that neither engaged nor motivated them.

Here, I turn to the questions:

Why do we educate our young people? What should we desire for them and how do we develop their varied skills?

I am again mindful of the fact that the word education has its origins in Latin – the term ‘educare’ means ‘to grow’ – and it falls to our generation to secure a better future for all and we do this often drawing on lessons from the past or, we could say, experience. We have a dysfunctional educational system, which does not fulfil the needs or meet the demands of our young people. It is a system which exclusively values a band of narrow academic qualifications and dismisses the wider abilities demonstrated by many young people. Oddly, it is these wider abilities which will serve them for the rest of their

lives and from which they will earn a living. So, why do we not place a high value on these other skills, which will be exhibited by the breadwinners within the majority of homes in the UK? Why should vocational qualifications, which have true lifelong potential, not have parity of esteem with academic qualifications?

Over the last 20 years we have seen schools emerge with a clear link to sport and concerns regarding the GCSE results of schools associated with established clubs, often those in the Premier League, have arisen. It is a given that if a young person has footballing talent that they should

have the chance, from a young age, to develop this potential. In a similar vein, we see that other sports fail to nurture new, top-ranking players or athletes, with many young people taking the opportunities offered to them overseas. However, the article in The Telegraph expresses concern that few are making the GCSE grade in Football Academies. Of more concern, surely, must be the fact that fewer than one in

200 pupils makes it as a professional footballer in any division!

Now, keep in mind that percentage of pupils making it from Football Academies to the professional football pitch and then consider the number of young people who left the ROA and went on to vocational careers in various fields. The figure for the Football Academies is one in 200 or 0.5%; we do not need a calculator to show how much we have improved the life chances for many who came through the School and, in comparison, our conversion rate from school to career is vastly superior. However, to continue to use the football analogy, the goalposts for the ROA were to be continually on the move.<sup>5</sup>

**Why do we not place a high value on these other skills, which will be exhibited by the breadwinners within the majority of homes in the UK?**

<sup>5</sup> <https://www.telegraph.co.uk/football/2017/02/09/exclusive-premier-league-concern-grows-gcse-results-academy/>



Closing the doors on 3rd September, 2018. Vincent Fish, Trustee and Chris Morgan, Second Chair of Trust

### The Drive and Energy of the Original Team

In essence, I would ask, have we a round peg for a square hole? Was the original plan at fault? They are sincere and honest questions, which have stood the test of time and the political agendas of all the main political parties and are questions which UK employers constantly raise as they feel schools do not provide them with young workers who are equipped with the required skills set for business and industry. As Lord Baker has said on many occasions, “If young people themselves are not feeling prepared for work, employers will continue to struggle with the recruitment issues that have become such a challenge for UK industry.”

This theme is echoed across the business sector; the task of developing more employable school leavers is not a simple one to address, it requires closer links between businesses and schools, with all three branches comprising government, the education sector and businesses working together to place a greater emphasis on work experience and the development of soft skills in the school curriculum. What does the heart of commerce in the UK

say? The British Chambers of Commerce has repeatedly called for businesses to offer more work placements for students in order to close the skills gap identified in today’s school leavers. The former Director General, John Longworth, said that compulsory work experience was crucial, “To ensure that every school pupil has the chance to feel the energy, dynamism, buzz and challenge of the workplace for themselves. Work experience is crucial to bringing down our stubbornly high youth unemployment rate. It will help ensure more young people are prepared for work. It will help close the yawning skills gaps reported by frustrated businesses across the UK, who face huge difficulty filling vacancies at every level”.

All mainstream political parties from left to right acknowledge the fact that, currently, schools are not providing industry and business with the correct skills set in school leavers.

Hence, with the ROA having both vocational and academic bases and with work experience an integral part of the curriculum, why was this not a dovetailed joint for a government of any complexion?

On reflection, the venture undertaken by the ROA was not really a ‘shot in the dark’ or a risky academic venture but rather one rooted on an empirical foundation, with the weight of experience and solid research behind it.<sup>6</sup>

### **The High Spirits of the Community and Various Stakeholders at the Outset**

It was not difficult to see the energy and the tremendous spirit of cooperation and enthusiasm in the early stages of the school. It was a vision universally shared by the community and in particular, the commercial sector of the local economy. It showed in the thinking and vision which had accompanied the bid.

Change, especially in education, always provokes a tremendous conservative force from those in support of the status quo. It was clear that in Herefordshire there was an alliance within the Local Authority, which aligned with the established schools’ network. What transpired was that this clear progressive move would exert, in a Blairite fashion, the ‘forces of conservatism’ at every level. The Local Authority never had a functioning relationship with the school and suspicion ran through its contact at nearly every stage of the Academy’s existence. Local schools were subsequently to use the school as a place where they could deposit the pupils they could not reach and teach and, in the process,

avoid the excruciating costs of a referral to the PRU (St David’s Centre).

This point, where we see others stand in the way of new ideas, in some senses, hits at the core of sustained progression. We have all heard the saying ‘it takes a village to rear a child’ and in a similar vein ‘it takes a community to rear a school’. This near-open hostility from some quarters was problematical to say the least.

### **My Desire to be the First Principal and Connections**

On the basis of the initial meeting with the Trust in an open forum, I attended the initial Stakeholders Meeting in 2012 where I saw, first-hand, the potential of the school from the outset. Coupled with this, I felt that I would bring my experience in business and in senior management of an FE College to ensure success for the school. In the event I did apply and was shortlisted and interviewed over a three-day period. It was not to be, and the appointment process is another story, one better told from the inside rather than the outside.

### **Linking the School with FE and Engineering**

As others with more first-hand experience can provide testimony, the school opened its doors not

in the city centre but at Holme Lacy, some several miles south of the city and river; with hindsight, opening in what was to be a ‘temporary’ location may not have been the best move, and it may have been better to have opened with a ‘new’ building. However, that is not to decry the move as it is better to show progress and open doors to learning than to delay.

I did oversee, from my position in what was then Walford and North Shropshire College, the facility to take pupils at the engineering base on our Tenbury Wells campus. With my then Principal, we met the ROA Principal in Tenbury to cement the partnership.

### **Opening in Hereford**

The Academy opened its doors in 2014 in Hereford on what was an ideal city centre site and with space to grow and develop. I attended the inaugural opening with the Principal.

Once again, the project was instilled with high hopes and a real aura of positivity. Here, the project met reality and we saw the real potential of a new initiative. I know that any school is more than its building – but the real estate is what is projected to the outside world. It was a better attraction than Holme Lacy, which I have never visited, and should act as a nucleus, appealing to more pupils. My view was that if the school could attract and retain pupils at a site located miles outside the area, which was difficult to reach by public transport, then bringing them into the city centre should be an easy task.

As my theme is ‘we never set foot in the same river twice’, I felt that I had seen the school on the start of a wonderful and positive journey, where the initial

opening problems – which included site, staffing and budget – would be put behind them. I again became connected with the school in late 2017 and carried out a scoping exercise to re-examine the potential opening for the Academy. Things had not gone according to plan – and it was clear that the aspirations had fallen on stony ground. Pivotal catalysts were issues with budget (money has to

feature somewhere!), this meant a re-structure of staffing and added to this were the double Ofsted visits, which were days apart. Hindsight is a wonderful thing, but interventions of both budget and Ofsted could have easily been avoided.

If a new business is set up – let’s take the example of a vineyard – the wine does not come along the following week, it is a long process and, during those early stages, the vines need cultivation,

support and care. If a combine harvester is run through the vineyard at the end of Season One, don’t be surprised when there are no grapes for harvesting and don’t be shocked that in the heavy-handed process many of the vines have been ruined.

The old adage, we do not fatten a pig by weighing it, applies to continued inspection. The project needed critical support not blitzkrieg. We were building something for the long term. What is more, we were dealing with the lives of others; young people who have been turned off by education and were truly ‘disengaged’. Our core material was very, very fragile and often it included people who could not be measured by the normal yardstick.

### **A Double Ofsted Visit**

Again, not being present at the two Ofsted visits my observations are based on the trail of havoc which

**It was not difficult to see the energy and the tremendous spirit of cooperation and enthusiasm in the early stages of the school. It was a vision universally shared by the community.**

**“I sat in the meeting of health and care providers in Herefordshire with medical consultants and potential medical and nursing school sponsors from outside Herefordshire. We heard of the dire local situation and we heard how external sponsors wanted to integrate a medical and nursing school on the Robert Owen Academy site in co-operative partnership with the local health and care providers. We had it in our grasp but our local political leaders let it slip away.”**

Chris Morgan, Second Chair of Trust

<sup>6</sup> <https://www.unifrog.org/blog/developing-more-employable-school-leavers>



they caused and left in their wake, rather than on their conduct and the views expressed on site.

The next foot in the river is not into an educational institution on the rise and on the up, but one on the back foot, beset by a series of major issues which threatened its existence.

In the early weeks of 2017, I worked alongside Trust and Governors to make a reasoned response to the Ofsted report. However, as we know, Ofsted inspectors are much better at spotting the mistakes of others as opposed to identifying their own as they have omnipotent power in the land of education. It is a bit like having a doctor to come and diagnose your ills, but they do not have the capacity for restorative medicine; they are happy to sign a death certificate rather than advise and supply the cure.

In a short period of time, Ofsted, dysfunctional staffing at certain levels, one ‘hellish’ onslaught by a maverick and unpleasant set of parents and budget difficulties had been the combine harvester in the vineyard. Rapid repair and renewal were now called for.

In the Spring Term 2017, I came into the Academy and got to know the staff and the curriculum. At Easter 2017, both the Principal and the Deputy Principal left and I took up the post of Executive Principal. The next term was duly busy, and we had a series of immediate issues to deal with.

**“Within all this tangled web just hang on to the fact that it is only the children and students that matter”**

Chris Morgan, Second Chair of Trust

## Summer Term 2017

### A New Co-operative Leadership Team

The departure of the Principal and Deputy Principal created the opportunity to re-shape how the Academy was managed. With the promotion of three members of staff to Assistant Principal level we moved forward. The strategy was to build lines of ownership and empower those who were taking a senior role in the school, giving them the opportunity to lead.

### Exams Ahoy!

In a steep learning and fixing curve, we discovered no coursework had been done for two GCSEs as the staff responsible had left. We had to deal with City & Guilds verification, which was in poor shape, and battle blockages for months to come. Getting everyone ready for the examinations was the first call. In addition, Edexcel was informed of alleged assessment misconduct on the Academy’s part by the family of a student.

### Safeguarding Inspection

Several letters had been sent to Ofsted, who then passed these on to the Local Authority and its Safeguarding Team. We underwent a full audit of our safeguarding process, to find that far from being out of step and behind the curve, our policies and standard practice were spot on and our work was given to the Local Authority to be used as a template for others to follow and emulate.

### Yes Minister

It is hard to thank Theresa May for no decision being taken on the Academy, but the General Election of 2017 slowed down the thought and action processes of Whitehall.

The endeavours of a local MP had created the

opportunity for an ROA delegation comprising me, the Chair of the Trust and the Deputy Chair of Governors to meet with the Minister in Sanctuary Buildings in London.

In fairness, the Minister treated us with respect and listened to our story; the presence of the senior civil servant and the RSC, who remained after we left, no doubt provided an opportunity for more private discussion, which may not have been in our favour. However, whether it was the General Election or our message, or both, we were reprieved for another academic year.

### A Family at War

The opening lines of Tolstoy’s Anna Karenina say that all happy families have similarity in their lines of happiness, but the unhappy family has its own intrinsic lines of discord. I have no idea of the line of unhappiness with one particular family, who sent two pupils to us. I feel slightly aggrieved at giving them the oxygen of publicity here, for they do not deserve it, but their actions consumed my time and energy in the same way that it had done with the former Principal.

My first action as Principal was to exclude permanently a student of the aggrieved and aggressive family. This culminated in a full hearing of the Governing Body and a further final appeal hearing before an independent body in late in August. At both hearings I spoke, and my decision was upheld.

Likewise, their sabotage with each examination board, Ofsted and the Local Authority Safeguarding Team were all robustly defended and the case against us was dismissed.

I was constantly supported by the Trust, Governing Body and staff throughout the whole process. Sadly, it was a process which continued throughout 2017/18. Unpredictable, nasty, aggressive,

intimidating and downright rude, the family was foiled at all attempts, although it sapped the energy of others, but people like this cannot succeed or we, as a society, are doomed.

## A New Academic Year 2017/18

### Overview

This was a year of highs and lows. September 2017 saw a new term introduced with enthusiasm and with the drive and determination of a re-invigorated staff and student cohort. We had a new curriculum in place and empowered staff. The lack of a decision instilled hope that those in authority had reconsidered our position and had begun to appreciate the work we were doing. We adopted a more ‘media friendly’ position and had positive coverage in the local media.

### Residential activity



However, in the Autumn Term the ghost of civil servants past came back to haunt us. In a series of regressive moves by those above us, a set of actions came to undermine the ROA and dent the aspirations of those who worked and studied there.

### **Consultation or a Lack of Listening?**

In the Autumn Term the RSC initiated a 'listening period' when it approached the ROA to 'listen' to how it was going to deal with our future. Note this was a listening event, but our actions and petitions seemed to fall on deaf ears....however, none are so deaf as those who will not hear.

It was certainly not a period of consultation and definitely not one of dialogue. Again, the ROA was to go through a period of judgement and placed in the dock, but it was not allowed to articulate fully its position and role.

### **To Broker or Not to Broker....That was NEVER a Serious Question!**

It was part of the RSC's role to consider re-brokering the Academy, with the aim of it joining a Multi-Academy Trust (MAT). A suitable MAT partner was secured, one where there was a manifest vision to carry the ROA to its next stage. Importantly, it had a tremendous synergy with the changing local needs of the economy and the partnership was to replicate the successful (and oversubscribed) enterprise of Berkeley Green. Academically, it made sense and there was much to gain for the business and educational communities in this move. All this seemed to fit the phrase a 'no brainer', so a financial hurdle was put in place – again, it was explained how this could be overcome – but the listeners were not hearing, and no real brokerage ever took place.

### **Bring out the Big Guns – Let's Get Ofsted in!**

Ofsted was due to visit the school after its last inspection before Easter of 2017. It had rejected the Post Ofsted Action Plan (POAP) and said it would review its replacement when it visited. No visit occurred before Easter, none arrived in the Summer Term and there was still no visit in the Autumn Term. The ROA should have expected to benefit from advice and constructive dialogue in how it was responding to the 2016 inspections. In

February, still with no news from the 'listening period', there was a call one Friday informing us of a two-day visit by Ofsted the following Monday and Tuesday, to be led by a Senior HMI.

During the two-day visit our revised POAP was scrutinised, our action plans reviewed, our curriculum changes monitored,

our classes observed, the conduct of our students investigated, and the support of the Trust and Governing Body examined.

Far from finding a school on its knees and delivering a poor-quality experience for its students, the complete opposite was observed. Lessons were deemed to be good and better, students were well-behaved and engaged, the curriculum was considered effective, and there was a plan that was being adhered to and monitored by the Trust and Governing Body. Effective management and a sound learning environment were evident.

It was one of the joys of being a teacher to hear the feedback given by this HMI.

On the day that the Ofsted report was made public, a letter from the DfE and RSC announced that the school would close on August 31st. A strange coincidence or fate?

**September 2017 saw a new term introduced with enthusiasm and with the drive and determination of a re-invigorated staff and student cohort.**

### **Caught on Camera – The TV Broadcasts**

In the spring of 2018, the Trust appointed and secured the work of PR Company, Clarke Associates, with the aim of proactively promoting the image of the Academy. One of its first successes was to put the Academy on the map with a positive article in the Hereford Times and then a successful broadcast on ITV Central News, which showed the Academy in a very favourable light. So much so, a senior civil servant contacted me after the item had been aired, concerned about the impact it would have in terms of initiating support for the school. He asked me what the Chair's and Trust's spirits were currently like, I simply replied it was like Dunkirk, to which he fell silent. The cameras of ITV and the BBC came in the summer, once again our image was brilliant, and we shone in the media spotlight.

### **Concluding Reflections**

#### **Working with other Staff**

We have benefitted from a dedicated and enthusiastic set of academic colleagues who proved, once again, the spirit and drive to go that extra mile. We created a management team that stepped up to the mark and made a difference, a set of teaching staff who proved their worth in the classroom and beyond, a team of support staff from front office to maintenance who had the learners and their experiences as their driver. No school could wish for more. No student lacked support or encouragement from them.

I feel that staff who have left us have done so with academic esteem and pride and the personal satisfaction that they have made a difference. The fact that many have instantly gained further employment is proof of their talent.

### **The Difference made to Young People's Lives**

We can neither measure the unmeasurable nor calculate the incalculable. What is the price and cost of a young person not attending school and gaining no academic or vocational qualifications? How much will social services pay if a young person is estranged from society? We still live in two nations, where the chances of the many are dwarfed by the advantages of the few.

One day in the summer of 2017, when at the Academy, I was asked to speak to other teachers at Harrow School in London, many were from the private sector and were worried about how their fee-paying students would be able to secure an Oxbridge place in the light of a new A level. The private school was light years away from the experience of the students at the Academy. We were taken on a tour of the school, I asked whether it was OK for me to leave my iPad in the classroom. The Master replied, "Paul you could leave your wallet here and, if any of the boys found it, they would put some money in it for you." In education we have for some what I call the Matthew principle, 'To them that have, shall be given'.

The most vulnerable section in our educational system is the one comprising people who lose out – always and every time. Can Philip Larkin's words really be true?

Man hands on misery to man.  
It deepens like a coastal shelf.  
Get out as early as you can,  
And don't have any kids yourself.

This cannot be the case; we have to fight for the many to get the best from the unequal society in which we live.

**“Do not mourn the ashes – fan the flame”**



# Abbreviations and Acronyms

ALPS	Alternative learning Pathways for Success		
AP	Alternative Provision		
BTEC	Business and Technology Education Council		
CIF	Condition Improvement Funding		
DfE	Department for Education		
E(S)FA	Education (and Skills) Funding Agency		
ESAT	Eden Schools Academy Trust		
FE	Further Education		
FNtl	Financial Notice to Improve		
GCSE	General Certificate in Secondary Education		
HASH	Herefordshire Association of Secondary Headteachers		
HCC	Hereford County Council		
HMI	Her Majestys Inspector		
IOC	It's Our County		
ITE	Initial Teacher Education		
JCQ	Joint Council for Qualifications		
LA	Local Authority		
Mace Group/MACE	Consultancy and Construction Company	Project Managers	
MAT	Multi Academy Trust		
MP	Member of Parliament		
NEETS	Not in Education, Employment or Training		
NMiTE	New Model in Technology & Engineering		
OU	Open University		
PGCE	Post Graduate Certificate in Education		
PNA	Pupil Number Adjustment		
POAP	Post Ofsted Action Plan		
PR	Public Relations		
PRU	Pupil Referral Unit		
RI	Requires Improvement		
RO(V)S	Robert Owen (Vocational) School	Name up to August 2014	
ROA	Robert Owen Academy	Name from August 2014	
ROAT	Robert Owen Academies Trust		
ROCKET	Recording of Competence, Knowledge, Education and Training		
RSC	Regional Schools Commissioner		
SAS	Student Associate Scheme		
SCITT	School Centred Initial Teacher Training		
SGSC	South Gloucestershire and Stroud College		
SLT	Senior Leadership Team		
SoS	Secretary of State		
SRB	Single Regeneration Bid		
TEC	Training and Enterprise Council		
TVEI	Technical and Vocational Education Initiative		
UTC	University Technical College		
VETO	Vocational Education and Training Opportunities		
VLUK	Virtual Learning UK		
Voc Bac	Vocational Baccalaureate		Our Qualification aim
WDC	Wilmott Dixon Construction		Builders
WISE	Women into Science and Engineering		
WJEC	Welsh Joint Education Council		Exam Board

# List of References

- Briefing to Hereford Council Responses 11.08.2012
- Briefing to Hereford Council on EFA Criteria 11.08.2012
- Education Act 1944, 'Butler Act'
- Extracts from the Robert Owen Governance Guide
- Free Schools Application, October 2012, Robert Owen Foundation
- Governing Body Minutes 16.09.2016 item 6, EFA lethargic responses to communication re: roof
- Hereford Times 22nd November 2012, "Opening new Free School would "decimate" education in Herefordshire"
- Hereford Times, 19 December 2012, "Council concerns over plans for Hereford Free School"
- Independent Financial Review, Haines Watts Birmingham LLP, June 2016
- Letters to Headteachers and Principals 11.08.2012
- Ofsted Inspection Reports
- School Curriculum Conference Report 07.2012
- Schools Curriculum Conference Group Responses 07.2012
- The Telegraph, Premier League Concern Grows (09.02.2017) <https://www.telegraph.co.uk/football/2017/02/09/exclusive-premier-league-concern-grows-gcse-results-academy/>
- Time Line for Comments with Hereford Council 09.01.2012
- Trust Letter in Response to HCC's Questions re: EFA 07.08.2012
- <https://www.unifrog.org/blog/developing-more-employable-school-leavers>





**The Robert Owen Academies Trust has closed.**

**However, enquiries can be made or orders placed  
for copies of *An Innovative School Ahead of its Time*  
by contacting:**

**Robert Owen Society  
Grange Court  
Leominster  
Hereford  
HR6 8NL**