



MPT Evaluation, Reporting and Planning Overview (Ref 01MP TERPO)



# Mosaic Partnership Trust

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## History of most recent changes

Version	Date	Page	Change	Origin of Change
V1.0	16/06/2024	Whole Document	Adoption by the Mosaic Partnership Trust and Implementation	New Academy Trust document that outlines processes for Evaluating, Reporting and Planning at Trust and Local level



## 1.0 Overview

This document sets out how the Mosaic Partnership Trust evaluates, reports and plans at the different levels within the organisation. It aims to set out a clear overview of what happens and when and how different processes link together.

This document draws from a range of sources to ensure that as a Trust we follow best practice including but not limited to:

- [Commissioning High-Quality Trusts \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)
- [Annex A - Trust Quality Descriptions \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)
- [Annex B – Trust Quality Evidence \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)
- [Academy trust risk management - GOV.UK \(www.gov.uk\)](https://www.gov.uk)
- [Academy trust governance guide - Guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk)
- Being the CEO Report 2023 – Forum Strategy (Available to Members only)
- [Good practice guide: Good practice in annual reporting February 2024 \(nao.org.uk\)](https://nao.org.uk)
- [A School's Guide to Implementation guidance report | Education Endowment Foundation \(d2tic4wvo1iusb.cloudfront.net\)](https://d2tic4wvo1iusb.cloudfront.net)
- [Editable implementation plan template | Education Endowment Foundation \(d2tic4wvo1iusb.cloudfront.net\)](https://d2tic4wvo1iusb.cloudfront.net)
- DNA of Trust-led school improvement – CST
- Guide to using conceptual model – CST

## 2.0 Key evaluation, reporting and planning documents

Name of Document	Type of Document	Level for Document	Shared/presented
Annual Report to Members	Report	Members	Spring Term
Summary Report to Members	Report	Members	Autumn Term and Summer Term
Trust Strategic Plan	Plan	Trustees	September November February May July
CEO Report to Trustees	Report	Trustees	September November February May
CFO Report to Trustees	Report	Trustees	September November February May
Trust Risk Register	Register	Trustees	September February July
DOE Quality of Education Report	Report	Trustees (Sub-Committee)	October December April/May July



## MPT Evaluation, Reporting and Planning Overview (Ref 01MP TERPO)

School Strategic Plan	Plan	ACCs	October February May
Strategic Plan and Risk Report	Report	ACCs	February May
Inclusion and Context Report	Report	ACCs	December March/April July
ACC Risk Register	Register	ACCs	October February May

### 3.0 Trust and School Strategic Plans

The Trust Strategic Plan will cover the following 5 areas that align with the Trust Quality Evidence Descriptions and are as follows:

- High Quality and Inclusive Education
- School Improvement
- Workforce
- Finance and Operations (Resources)
- Governance and Leadership

The Trust Strategic Plan will follow the guidance as set out in the EEF guide to implementation and will also include milestones:

Problem (why?)	Intervention description (what?)	Implementation Strategies (how?)	Implementation Outcomes (how well?)	Final Outcomes (and so?)
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At school level, the school strategic plan will cover the first two areas of the Quality Evidence Descriptions which are as follows:

- High Quality and Inclusive Education
- School Improvement

The School Strategic Plan will follow the guidance as set out in the EEF guide to implementation and will also include milestones:

Problem (why?)	Intervention description (what?)	Implementation Strategies (how?)	Implementation Outcomes (how well?)	Final Outcomes (and so?)
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### 4.0 Trust and ACC Risk Registers

Risk registers are in place at Trust level but also at school level.

The CEO keeps the central risk register under continual review in the light of changing circumstances that covers Risk Areas 1-5 from the Quality Evidence Descriptions.



## MPT Evaluation, Reporting and Planning Overview (Ref 01MPTERPO)

Risk Area	Code
<b>1. High Quality and Inclusive Education:</b>	
Quality of Education including curriculum	QE
School Context	SC
Behaviour, Attitudes and Attendance	BA
Safeguarding	SA
Community	CO
<b>2. School Improvement:</b>	
Pupil Outcomes	PO
<b>3. Workforce:</b>	
Personnel	PE
<b>4. Finance and Operations (Resources):</b>	
Finance	FI
Central Services	CS
Resources	RS
Estate, including Health and Safety	ES
<b>5. Governance and Leadership:</b>	
Leadership and Management	LM
Governance	GO

Each school has its own risk register based on the model below and it is reviewed on a cycle at ACC meetings/Trust Board and with the CEO/Director of Education at the Mosaic Annual School Review meeting. The ACC Risk Register covers the following areas.

Risk Area	Code
<b>1. Workforce:</b>	
Personnel	PE
<b>2. Resources and Estates:</b>	
Resources	RS
Estate, including Health and Safety	ES
<b>3. Governance and Leadership:</b>	
Leadership and Management	LM
Governance	GO



## MPT Evaluation, Reporting and Planning Overview (Ref 01MP TERPO)

The format for both the Trust and ACC Risk Register is as follows with details of how to complete the document at the start of each Risk Register.

Risk No.	Risk Area	Risk Description	Risk Consequence	Risk Score	Risk Resp.	Controls and Mitigation	Lead Person	Movement
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### 5.0 CEO, CFO, DOE and Heads Reports

#### Overview

The Trust follows the NAO principles in terms of effective reporting.

- Supporting accountability
- Transparency
- Accessibility
- Understandable

All reports are intended to be:

- High-level
- Succinct
- Honest

The reports all follow the same process which is simple and aligns with the Forum Strategy recommended format that focuses on:

What is going well? How do you know?	What is not going well? How do you know?	What am I prioritising?
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#### CEO Reporting

The CEO Annual report and summary reports to Members will be based on the Trust Quality Evidence Descriptions:

- High Quality and Inclusive Education
- School Improvement
- Workforce
- Finance and Operations
- Governance and Leadership

The CEO reports align with the single Trust Strategic Plan and will include information that covers each school at a high level:

- Annual dashboard of outcomes (including SEND and disadvantaged)
- Pupil numbers
- SEND/EHCP/EAL and disadvantaged NOR
- Attendance including persistent absence
- Suspensions and permanent exclusions
- Bullying
- Protected Characteristic Based Incidents
- Safeguarding concerns logged (CPoms)
- Referrals to social services



Thereafter the report will cover the Trust Quality Evidence Descriptions:

- High Quality and Inclusive Education
- School Improvement
- Workforce
- Finance and Operations
- Governance and Leadership

### CFO and DOE Reporting

The CFO report and DOE of reports will be bespoke, but will also follow the same process as outlined above in terms of:

<b>What is going well?</b> How do you know?	<b>What is not going well?</b> How do you know?	<b>What am I prioritising?</b>
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### Heads Reporting

At ACC level, Heads will complete two types of report which will alternate during the academic year and should be no longer than three pages in length in line with the given format. They will follow the same process as outlined above in terms of:

<b>What is going well?</b> How do you know?	<b>What is not going well?</b> How do you know?	<b>What am I prioritising?</b>
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The Inclusion and Context Report will be more contextual and will report key data as follows before working through the 3 key questions:

- Pupil numbers
- SEND/EHCP/EAL and disadvantaged NOR
- Attendance including persistent absence
- Suspensions and permanent exclusions
- Bullying
- Protected Characteristic Based Incidents
- Safeguarding concerns logged (CPoms)
- Referrals to social services
- Staffing

The Strategic Plan and Risk Report will only comment on progress against the strategic plan and the three areas of the Risk Register. The report should be strategic, working through the 3 core questions.