FREEDOM OF INFORMATION REDACTION SHEET

New Bridge School
Deed of Variation

Exemptions in full

n/a

Partial exemptions

Personal Information has been redacted from this document under Section 40 of the Freedom of Information (FOI) Act.

Section 40 of the FOI Act concerns personal data within the meaning of the Data Protection Act 1998.

Factors for disclosure	Factors for Withholding
▪ further to the understanding of and increase participation in the public debate of issues concerning Academies. ▪ to ensure transparency in the accountability of public funds	▪ To comply with obligations under the Data Protection Act

<u>Reasons why public interest favours withholding information</u>

Whilst releasing the majority of the New Bridge School Deed of Variation to Supplemental Funding Agreement will further the public understanding of Academies, the whole of these documents cannot be revealed**.** If the personal information redacted were to be revealed under the FOI Act, Personal Data and Commercial interests would be prejudiced.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

THE SECRETARY OF STATE FOR EDUCATION (1)

and

NEW BRIDGE MULTI ACADEMY TRUST (2)

DEED OF VARIATION

relating to the supplemental funding agreements for

New Bridge School

Hollinwood Academy

The Springboard Project

Hawthorns School

Thomas Ashton School

The Parties to this Deed are:

(1) **The Secretary of State for Education** of Sanctuary Buildings, Great Smith Street, London SW1P 3BT (the "**Secretary of State**");
- and –
(2) **New Bridge Multi Academy Trust**, a charitable company incorporated in England and Wales with registered company number 08131158 whose registered address is at New Bridge School Roman Road, Hollinwood, Oldham, OL8 3PH (the "**Company**").

together referred to as the "**Parties**".

INTRODUCTION

A. The Parties have entered into a supplemental funding agreement in respect of New Bridge School on 27 August 2014, (the "**Existing New Bridge SFA**");

B. The Parties have entered into a supplemental funding agreement in respect of Hollinwood Academy on 20 March 2015 by way of a Deed of Variation (the "**Existing Hollinwood SFA**");

C. The Parties have entered into a supplemental funding agreement in respect of The Springboard Project on 21 January 2019, (the "**Existing Springboard Project SFA**");

D. The Parties have entered into a supplemental funding agreement in respect of Hawthorns School by way of a Deed of Variation on 27 February 2018, (the "**Existing Hawthorns SFA**");

E. The Parties have entered into a supplemental funding agreement in respect of Thomas Ashton on 23 December 2024, (the "**Existing Thomas Ashton Project SFA**");

F. The Parties have agreed to amend and re-state the terms of the Existing SFAs, on the terms set out in this Deed.

LEGAL AGREEMENT

1. Words, expressions and interpretations used in this Deed shall, unless the context expressly requires otherwise, have the meaning given to them in, and shall be interpreted in accordance with, the Amended SFAs (as defined in clause 2 below).

2. The Parties agree that with effect from the date of this Deed, the **Existing New Bridge SFA** shall be amended and re-stated in the form of the Amended Broken Cross Primary Academy and Nursery SFA set out in Schedule 1 (the "**Amended New Bridge SFA**"). For the avoidance of doubt, the **Amended New Bridge SFA** does not terminate or suspend the **Existing New Bridge SFA** but amends and re-states it.

3. The Parties agree that with effect from the date of this Deed, the **Existing Hollinwood SFA** shall be amended and re-stated in the form of the Amended The Fallibroome Academy set out in Schedule 2 (the "**Amended Hollinwood SFA**"). For the avoidance of doubt, the **Amended Hollinwood SFA** does not terminate or suspend the **Existing Hollinwood SFA** but amends and re-states it.

4. The Parties agree that with effect from the date of this Deed, the **Existing Springboard Project SFA** shall be amended and re-stated in the form of the **Amended Springboard Project SFA** set out in Schedule 3 (the "**Amended Springboard Project SFA** "). For the avoidance of doubt, the **Amended Springboard Project SFA** does not terminate or suspend the **Existing Springboard Project SFA** but amends and re-states it.

5. The Parties agree that with effect from the date of this Deed, the **Existing Hawthorns SFA** shall be amended and re-stated in the form of the **Amended Hawthorns SFA** set out in Schedule 4 (the "**Amended Hawthorns SFA** "). For the avoidance of doubt, the **Amended Hawthorns SFA** does not terminate or suspend the **Existing Hawthorns SFA** but amends and re-states it.

6. The Parties agree that with effect from the date of this Deed, the **Existing Thomas Ashton SFA** shall be amended and re-stated in the form of the **Amended Thomas Ashton SFA** set out in Schedule 5 (the "**Amended Thomas Ashton SFA** "). For the avoidance of doubt, the **Amended Thomas Ashton SFA** does not terminate or suspend the **Existing Thomas Ashton SFA** but amends and re-states it.

GOVERNING LAW AND JURISDICTION

7. This Deed, and any dispute or claim arising out of or in connection with it, its subject matter or formation (including non-contractual disputes or claims) shall be governed by and interpreted in accordance with the law of England and Wales.

8. The Parties irrevocably agree that the courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim that arises out of, or in connection with, this deed or its subject matter or formation (including non-contractual disputes or claims).

COUNTERPARTS

9. This Deed may be executed in any number of counterparts and by the parties to it on separate counterparts, each of which when so executed and delivered shall be an original, but all the counterparts shall together constitute one and the same instrument.

IN WITNESS whereof this Deed has been executed by the parties hereto and is intended to be and is hereby delivered on the last date listed below.

EXECUTED as a deed by affixing the corporate)
seal of the **Secretary of State for Education**)
authenticated by:-)

[redacted]

Duly authorised by the Secretary of State for Education

Date 02/02/26

EXECUTED as a deed by **NEW BRIDGE MULTI ACADEMY TRUST** acting by:

[redacted]

Director

Print name [redacted]

Date.....

[redacted]

Director

Print name [redacted]

Date.....

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Schedule 1

Amended New Bridge SFA

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Department for Education

Special academy and free school: supplemental funding agreement

December 2020 v3

New Bridge School

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

CONTENTS

SUMMARY **4**

Information about the Academy: 4

1.ESTABLISHING THE ACADEMY **7**

Definitions and interpretation 7

The Academy 8

Academy opening date 9

2.RUNNING OF THE ACADEMY **9**

Length of school day and year 9

Teachers and staff 9

Places and Pupils 11

Charging 12

Admissions 12

Exclusions 16

Curriculum 16

3.GRANT FUNDING **17**

Calculation of GAG 17

Other relevant funding 20

4.LAND **21**

Version 2: existing site to be held under church supplemental agreement or lease from site trustees 32

5.TERMINATION **54**

Termination by either party 54

Termination Warning Notice 54

Termination by the Secretary of State after inspection 55

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Termination by the Secretary of State 57

Funding and admission during notice period 59

Notice of intention to terminate by Academy Trust 60

Effect of termination 62

6.OTHER CONTRACTUAL ARRANGEMENTS 63

Annexes 63

The Master Agreement 63

General 64

Information Sharing with Local Authorities – Statutory Responsibilities 64

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

SUMMARY

Information about the Academy:

Name of Academy Trust	New Bridge Multi Academy Trust
Company number	08131158
Date of Master Funding Agreement	21 January 2019
Name of academy	New Bridge School
Opening date	1 September 2012
Type of academy (indicate whether academy or free school)	Academy
Name of predecessor school (where applicable)	N/A
Planned number of places (if the academy has a nursery provision please provide a breakdown of nursery and statutory school age places)	800
Age range (including nursery provision where the nursery is part of the school)	5-19
Number of sixth form places	120
Number of residential places	N/A
Land arrangements **(Version 1-8 or other)**	3
Address and title number of Land (and Temporary Site)	Roman Road, Hollinwood, Oldham, OL8 3PH, Title Numbers: LA76683 and MAN150844 St. Martin's Road, Fitton Hill, Oldham, OL8 2PZ 77 Union Street, Oldham, OL1 1JZ

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Name of Academy Trust	New Bridge Multi Academy Trust
	1 Medtia Square, Phoenix Street, Oldham, OL1 1A

Please confirm which clause variations have been applied or marked as 'Not used'

Clause No.	Descriptor	Applied	Not used
1.J	Only applies to free schools and new provision academies	x	
2.D	Only applies to free schools admitting pupils without an education, health and care (EHC) plan		x
2.G	Only applies where there was a predecessor independent school or non-maintained special school		x
2.G.1	Only applies to Free schools with nursery provision		x
2.S to 2.EE	Only applies to free schools or new provision academies that admit pupils without an EHC plan		x
2.FF	Does not apply to free schools (unless there was a predecessor independent school or non-maintained special school), or new provision academies		x
2.GG	Only applies to free schools or new provision academies that admit pupils without an EHC plan		x
3.B – 3.G	Only applies to free schools or new provision academies that admit pupils without an EHC plan		x
3.H	Clause does not apply to academy converters or new provision academies		x
3.I.1	Only applies to Free schools with nursery provision		x
3.J	Only applies to full sponsored and intermediate sponsored academies with approved Academy Action Plans		x

Clause No.	Descriptor	Applied	Not used
3.K	Does not apply to free schools (unless there was a predecessor independent school or non-maintained special school), or new provision academies		x
5.G.1	Clause applies only to boarding academies/boarding free schools		x
5.I	Clause only applies to sponsored academies		x
5.K	Clause applies to free schools and may be applied to new provision academies		x
5.L	Clause applies to free schools and may be applied to new provision academies		x
5.M	Clause applies to free schools and may be applied to new provision academies	x	
5.N	Clause applies to free schools and may be applied to new provision academies		x
5.O	Clause applies to free schools and may be applied to new provision academies		x
5.P	Clause applies to free schools and may be applied to new provision academies		x

Please identify any other variations from the model that apply to this academy (e.g. clauses relating to PFI):

Additional clauses will be supplied by your project lead if needed.

Descriptor	Clause No.	Applied	Not used

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

1. ESTABLISHING THE ACADEMY

1.A This Agreement made between the Secretary of State for Education and New Bridge Multi Academy Trust is supplemental to the master funding agreement made between the same parties and dated 21 January 2019 (the "**Master Agreement**").

Definitions and interpretation

1.B Except as expressly provided in this Agreement words and expressions defined in the Master Agreement will have those same meanings in this Agreement.

1.C The following capitalised words and expressions will have the following meanings:

"The **Academy**" means New Bridge School which is specially organised to make special educational provision for pupils with SEN.

"Coasting" has the meaning given by regulations under subsection (3) of section 60B of the Education and Inspections Act 2006 in relation to a school to which that section applies.

"**EHC plan**" means an education, health and care plan made under section 37(2) of the Children and Families Act 2014.

"**Pupils with an EHC plan**" means those pupils, with an EHC plan, admitted under clauses 2.C and 2.H to 2.R.

"**Pupils without an EHC plan**" means those pupils, with SEN but without an EHC plan, admitted under clauses 2.D and 2.S to 2.EE.

"**SEN**" means special educational needs and the expressions "**special educational needs**" and "**special educational provision**" have the meaning set out in sections 20(1) and 21(2) of the Children and Families Act 2014.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

"**Termination Notice**" means a notice sent by the Secretary of State to the Academy Trust, terminating this Agreement on the date specified in the notice.

"**Termination Warning Notice**" means a notice sent by the Secretary of State to the Academy Trust, stating his intention to terminate this Agreement.

1.D The Interpretation Act 1978 applies to this Agreement as it applies to an Act of Parliament.

1.E Reference in this Agreement to clauses and annexes will, unless otherwise stated, be to clauses and annexes to this Agreement.

The Academy

1.F The Academy is a Special Academy as defined in clause 1.4 of the Master Agreement.

1.G The Academy Trust will establish and maintain the Academy in accordance with the Master Agreement and this Agreement.

1.H The Academy Trust must ensure special educational provision is made at the Academy for one or more categories of SEN. These categories may include, but are not limited to SpLD - Specific Learning Difficulty, VI - Visual Impairment, OTH - Other Difficulty/Disability, HI - Hearing Impairment, SLCN - Speech, language and Communication, ASD - Autistic Spectrum Disorder, MSI - Multi-Sensory Impairment, PD - Physical Disability, MLD - Moderate Learning Difficulty, SLD - Severe Learning Difficulty and PMLD - Profound and Multiple Learning Difficulty.

1.I The Academy Trust may not refuse to admit a child whose EHC plan names the Academy on the sole basis that some, or all, of the child's SEN do not feature in the categories referred to in clause 1.H of this agreement.

1.J The Academy Trust must ensure that so far as is reasonably practicable and consistent with this Agreement and the Equality Act 2010, the policies and practices adopted by the Academy (in particular regarding curriculum, uniform and school food) enable pupils of all faiths and none to play a full part in the life of the Academy, and do not disadvantage pupils or Parents of any faith or

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

none. For the avoidance of doubt, this requirement applies irrespective of the proportion of pupils of any faiths or none currently attending or predicted to join the school.

Academy opening date

1.K The Academy Trust opened the Academy on 1 September 2012.

2. RUNNING OF THE ACADEMY

Length of school day and year

2.A.1 Further to clause 2.1 of the Master Agreement, the Academy Trust is responsible for setting the dates when the school terms and holidays are to begin and end, and the times of school sessions.

Teachers and staff

2.A Subject to clause 2.A.1b and 2.B of this Agreement the Academy Trust must not employ anyone under a contract of employment or for services to plan and prepare lessons and courses for pupils, teach pupils, and assess and report on pupils' development, progress and attainment ("specified work"), who is not either:

a) a qualified teacher within the meaning of regulations made under section 132 of the Education Act 2002; or

b) otherwise eligible to do specified work under the Education (Specified Work)(England) Regulations 2012 (SI 2012/762), which for the purpose of this clause must be construed as if the Academy were a maintained school.

2.A.1b The Academy Trust must designate a staff member at the Academy as responsible for promoting the educational achievement of registered pupils at the Academy who are being looked after by a LA, or are no longer looked after by a LA because of an adoption, special guardianship or child arrangements order, or because they have been adopted from 'state care' outside England and Wales, and in doing so must comply with the law,

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

regulations and guidance that apply to maintained schools. The Academy Trust must ensure the designated person undertakes appropriate training and has regard to any guidance issued by the Secretary of State.

2.B Clause 2.A will not apply to anyone who:

a) transferred to the employment of the Academy Trust by virtue of the Transfer of Undertakings (Protection of Employment) Regulations 2006;

b) immediately prior to the transfer, was employed to do specified work; and

c) immediately before transferring, was not:

i. a qualified teacher within the meaning of regulations made under section 132 of the Education Act 2002 and fully registered with the appropriate body, or

ii. eligible to do specified work under the Education (Specified Work)(England) Regulations 2012 (SE 2012/762)

("transferred staff member"). The Academy Trust must ensure that any transferred staff member that carries out specified work and does not meet the requirements of clause 2.A(a) or 2.A(b), meets those requirements as soon as possible.

Places and Pupils

2.C The planned number of places at the Academy is 800 places in the age range 5-19 , including a sixth form of 120 places. For the avoidance of doubt, where the specified age range would be a child's normal age group, the Academy is not prevented from considering applications made by the child's Parents under the relevant paragraph of the Schools Admissions Code ('Admission of children outside their normal age group'), to request that the child be admitted outside of their normal age group .

2.D Not used.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

2.E The Academy Trust must ensure that the Academy meets the needs of individual pupils.

2.F The Academy Trust must seek approval from the Secretary of State where they consider there is a need to increase the planned number of places stated in clause 2.C. The requirements of this Agreement may then be amended by agreement between the Secretary of State and the Academy Trust.

Charging

2.G [Not Used]

2.G.1 [Not used].

Admissions

2.H The Children and Families Act 2014 imposes duties directly on Academies in respect of pupils with SEN, including the admission of pupils with EHC plans. If an Academy Trust considers that a LA should not have named the Academy in an EHC plan, it may ask the Secretary of State to determine whether the LA has acted unreasonably, and to make an order directing the LA to reconsider. The Academy Trust must admit the pupil if such a determination is pending. The Secretary of State's determination will be final, subject to any right of appeal which a pupil (if over compulsory school age) or parent of the child may have to the First-tier Tribunal (Special Educational Needs and Disability) or the Upper Tribunal Administrative Appeals Chamber.

2.I Except where clauses 2.D and 2.T apply and any relevant provisions of the Children and Families Act 2014 apply, the Academy Trust may not admit a child to the school unless an EHC plan naming the Academy, is maintained for that child.

2.J [Not used]

2.K [Not used]

2.L [Not used]

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

2.M [Not used]

2.N [Not used]

2.O [Not used]

2.P [Not used]

2.Q [Not used]

2.R [Not used]

2.S [Not used]

2.T [Not used]

2.U [Not used]

2.V [Not used]

2.W [Not used]

2.X [Not used]

2.Y [Not used]

2.Z [Not used]

2.AA [Not used]

2.BB [Not used]

2.CC [Not used]

2.DD [Not used]

2.EE [Not used]

2.FF [Not used]

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Exclusions

2.GG [Not used]

Curriculum

2.HH Subject to clauses 2.II and 2.JJ the Academy Trust, must provide for the teaching of religious education and for a daily act of collective worship at the Academy.

2.II Subject to clause 2.JJ provision must be made for religious education to be given to all pupils at the Academy in accordance with the requirements for agreed syllabuses in section 375(3) of the Education Act 1996 and paragraph 2(5) of Schedule 19 to the School Standards and Framework Act 1998, the Academy must comply with the requirements of regulation 5A of the Education (Special Educational Needs)(England)(Consolidation) Regulations 2001 as if it were a maintained school.

2.JJ The Academy Trust must comply with requirements of regulation 5A of the Education (Special Educational Needs)(England)(Consolidation) Regulations 2001 as if it were a maintained school. The Academy Trust must comply with regulation 5A of the Education (Special Educational Needs) (England) (Consolidation) Regulations 2001 as if the Academy were a community or foundation special school, and as if references to “Religious Education” and to “Religious Worship” in that regulation were references to religious education and religious worship provided by the Academy in accordance with clause 2.II.

2.KK The Academy Trust agrees that, where the Academy is listed in the register of Independent Schools as having a religious ethos, paragraph 5(b) of Schedule 11 to the Equality Act 2010 shall not apply to the Academy.

2.LL The Academy Trust must comply with paragraph 2A of the Schedule to The Education (Independent School Standards) Regulations 2014 in relation to the provision of Relationships Education, Relationships and Sex Education and Health Education.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

2.MM The Academy Trust must prevent political indoctrination, and secure the balanced treatment of political issues, in line with the requirements for maintained schools set out in the Education Act 1996, and have regard to any Guidance.

3. GRANT FUNDING

Calculation of GAG

3.A The Secretary of State will determine GAG for the Academy for each Academy Financial Year, taking into account relevant factors.

3.B [Not used]

3.C [Not used]

3.D [Not used]

3.E [Not used]

3.F [Not used]

3.G [Not used]

Other relevant funding

3.J [Not used]

3.K [Not used]

Carrying forward of funds

3.L Any additional grant made in accordance with clause 3.I, for a period after the Secretary of State has served a Termination Notice or a Termination Warning Notice under this Agreement, or otherwise terminates the Master Agreement, may be carried forward without limitation or deduction until the circumstances set out in clause 3.I cease to apply or the Academy closes.

4. LAND

"**Land**" means the freehold land at Roman Road, Hollinwood, Oldham, OL8 3PH, being the land registered with title numbers LA76683 and MAN150844

which is to be the permanent site of the Academy.

"**Lease**" means the lease, any subsequent variations to the lease or other occupational agreement between the Academy Trust and a third party (the "**Landlord**") under which the Academy Trust derives title to the Land.

"**Property Notice**" means any order, notice, proposal, demand or other requirement issued by any competent authority (including the Landlord) which materially affects the Academy Trust's ability to use the Land for the purposes of the Academy or any correspondence that affects the extent of the Land.

Restrictions on Land transfer

4.A The Academy Trust must:

a) within 28 days of the signing of this Agreement in circumstances where the Land is transferred to the Academy Trust prior to the date of this Agreement, or otherwise within 28 days of the transfer of the Land to the Academy Trust, apply to the Land Registry using Form RX1 for the following restriction (the "**Restriction**") to be entered in the proprietorship register for the Land:

No disposition of the registered estate by the proprietor of the registered estate, or by the proprietor of any registered charge, not being a charge registered before the entry of this restriction, is to be registered without a written consent signed by the Secretary of State for Education, of Sanctuary Buildings, Great Smith Street, London SW1P 3BT;

b) take any further steps reasonably required to ensure that the Restriction is entered on the proprietorship register;

c) promptly confirm to the Secretary of State when the Restriction has been registered;

d) if it has not registered the Restriction, permit the Secretary of State to do so in its place; and

e) not, without the Secretary of State's consent, apply to disapply, modify, cancel or remove the Restriction, whether by itself, a holding company, a subsidiary company, or a receiver, administrator or liquidator acting in the name of the Academy Trust.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Obligations of the Academy Trust

4.B The Academy Trust must keep the Land clean and tidy and make good any damage or deterioration to the Land. The Academy Trust must not do anything to lessen the value or marketability of the Land without the Secretary of State's consent.

4.C The Academy Trust must comply with the Lease and promptly enforce its rights against the Landlord.

4.D The Academy Trust must not, without the Secretary of State's consent:

a) terminate, vary, surrender, renew, dispose of or agree any revised rent under the Lease;

b) grant any consent or licence; or

c) create or allow any encumbrance; or

d) part with or share possession or occupation; or

e) enter into any onerous or restrictive obligations,

in respect of all or part of the Land provided that the Academy Trust may grant a licence or share occupation of part of the Land with a proprietor or proposed proprietor of an academy or a body or individual providing services or facilities which are within the uses permitted by the Lease and where no relationship of landlord and tenant arises as a result of such occupation.

Option

4.E The Academy Trust grants and the Secretary of State accepts an option (the "**Option**") to acquire the Land at nil consideration. The Secretary of State may exercise the Option in writing:

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

a) if this Funding Agreement is terminated for any reason;

b) at any time on or after the issue of a Termination Notice; or

c) if, under clause 4.K, the Academy Trust and the Secretary of State agree that part of the Land should be demised or subleased to another academy trust;

d) if, under clause 4.M, the Academy Trust cannot use all or part of the Land as the permanent site of the Academy.

4.E.1 If the Option is exercised, completion will take place:

a) 28 days after the exercise date where a Termination Notice has not been issued; or

b) where a Termination Notice has been issued, the date specified in the Termination Notice as to when this Agreement shall terminate

and in either case in accordance with the Law Society's Standard Conditions of Sale for Commercial Property in force at that date.

Option notice

4.F The Academy Trust:

a) must, within 14 days after acquiring the Land or, if later, after signing this Agreement, apply to the Land Registry on Form AN1 (including a copy of this Agreement) for a notice of the Option (the "**Option Notice**") to be entered in the register, taking any further steps required to have the Option Notice registered and promptly confirming to the Secretary of State when this has been done;

b) if it has not registered the Option Notice, agrees that the Secretary of State may apply to register it using Form UN1;

c) must not, without the Secretary of State's consent, apply to disapply, modify or remove the Option Notice, whether by itself, a holding company, a subsidiary company, or a receiver, administrator or liquidator acting in the name of the Academy Trust, and

d) must, in the case of previously unregistered land, within 14 days after acquiring the Land or, if later, after signing this Agreement, apply to register a Class C(iv) land charge in the Land Charges Registry, and

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

send the Secretary of State a copy of the relevant entry within 7 days after the registration has been completed. If the Secretary of State considers that the Academy Trust has not complied with this clause, he may apply to secure the registration.

Property notices

4.G If the Academy Trust receives a Property Notice, it must:

a) send a copy of it to the Secretary of State within 14 days, stating how the Academy Trust intends to respond to it;

b) promptly give the Secretary of State all the information he asks for about it;

c) allow the Secretary of State to take all necessary action, with or instead of the Academy Trust, to comply with it, and

d) use its best endeavours to help the Secretary of State in connection with it.

Breach of Lease

4.H If the Academy Trust is, or if it is reasonably foreseeable that it will be, in material breach of the Lease, the Academy Trust must immediately give written notice to the Secretary of State stating what the breach is and what action the Academy Trust has taken or proposes to take to remedy it, including timescales where appropriate.

4.I After notifying the Secretary of State under clause 4.H, the Academy Trust must:

a) promptly give the Secretary of State all the information he asks for about the breach;

b) allow the Secretary of State to take all necessary action, with or instead of the Academy Trust, to remedy or prevent the breach, and

c) use its best endeavours to help the Secretary of State to remedy or prevent the breach.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Sharing the Land

4.J Where:

a) the Secretary of State identifies basic or parental need for additional places in the area in which the Academy is situated; and

b) the Secretary of State then considers that not all the Land is needed for the operation of the Academy at planned capacity,

the Secretary of State must consult with the Academy Trust to determine whether part of the Land could be demised or sublet to another academy trust, as the Secretary of State considers appropriate, for the purpose of that academy trust establishing and maintaining an educational institution on the Land.

4.G To the extent the Academy Trust and the Secretary of State agree to part of the Land being demised or sublet in accordance with clause 4.J, the Academy Trust must use its best endeavours to procure either the approval of the Landlord or any necessary amendments to the Lease in order to enable it to share occupation of the Land with the incoming academy trust and to provide the incoming academy trust with security of occupancy over the Land occupied by it, and shall enter into any legal arrangements which the Secretary of State requires for this purpose. The Secretary of State shall meet the necessary and reasonable legal costs incurred by the Academy Trust in connection with entering into any such arrangements under this clause.

4.H For the purposes of clause 4.J:

a) a **basic need** will arise when the forecast demand for pupil places in the area where the Academy is situated is greater than the existing capacity to provide them;

b) a **parental need** will arise when the Department for Education is actually aware of an additional demand for pupil places in the area

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

where the Academy is situated, following representations from Parents in that area; and

c) **planned capacity** has the meaning given in clause 2.C.

4.I If the Academy Trust cannot use all or part of the Land as the permanent site of the Academy but the Secretary of State agrees not to terminate this Agreement on that basis, the Secretary of State may notify the Academy Trust that he intends to exercise the Option to transfer the Land for nil consideration to himself or his nominee.

4.J On or following the issue of a Termination Notice, the Secretary of State may give notice that he intends to exercise his rights under clause 4.E. Any such notice is without prejudice to his right to exercise any other rights available to him.

5. TERMINATION

Termination by either party

5.A Either party may give at least seven Academy Financial Years' notice to terminate this Agreement. Such termination would take effect on 31 August of the relevant year.

Termination Warning Notice

5.B The Secretary of State may serve a Termination Warning Notice where he considers that:

a) the Academy Trust has breached the provisions of this Agreement or the Master Agreement; or

b) the standards of performance of pupils at the Academy are unacceptably low; or

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

c) there has been a serious breakdown in the way the Academy is managed or governed; or

d) the safety of pupils or staff is threatened, including due to breakdown of discipline.

e) the Academy is Coasting provided he has notified the Academy Trust that it is Coasting.

5.C A Termination Warning Notice served under clause 5.B will specify:

a) the action the Academy Trust must take;

b) the date by which the action must be completed; and

c) the date by which the Academy Trust must make any representations, or confirm that it agrees to undertake the specified action.

5.D The Secretary of State will consider any representations from the Academy Trust which he receives by the date specified in the Termination Warning Notice. The Secretary of State may amend the Termination Warning Notice to specify further action which the Academy Trust must take, and the date by which it must be completed.

5.E If the Secretary of State considers that the Academy Trust has not responded to the Termination Warning Notice as specified under clause 5.C(c), or has not completed the action required in the Termination Warning Notice as specified under clauses 5.C(a) and (b) (and any further action specified under clause 5.D) he may serve a Termination Notice.

Termination by the Secretary of State after inspection

5.F If the Chief Inspector gives notice to the Academy Trust that:

a) special measures are required to be taken in relation to the Academy; or

b) the Academy requires significant improvement

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

the Secretary of State may serve a Termination Warning Notice, specifying the date by which the Academy Trust must make any representations.

5.G In deciding whether to give notice of his intention to terminate under clause 5.F, the Secretary of State will have due regard to the overall performance of the Academy Trust.

5.G.1 Not used.

.

5.H If the Secretary of State has served a Termination Warning Notice under clause 5.F and:

a) has not received any representations from the Academy Trust by the date specified in the notice; or

b) having considered the representations made by the Academy Trust remains satisfied that this Agreement should be terminated;

he may serve a Termination Notice.

5.I Not used.

Termination by the Secretary of State

5.J If the Secretary of State has determined that the Academy will be removed from the Register of Independent Schools and no appeal against that determination is pending, he may serve a Termination Notice.

5.K Not used.

5.L Not used.

5.M If both parties agree that the Academy is not financially viable because of low pupil numbers, they may jointly terminate this Agreement after agreeing the precise terms of termination.

5.N Not used.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

5.O Not used.

5.P Not used.

Funding and admission during notice period

5.Q If the Secretary of State serves a Termination Notice under clause 5.A, the Academy Trust may continue during the notice period to admit pupils to the Academy, and to receive GAG and EAG, in accordance with this Agreement.

5.R If the Secretary of State serves a Termination Warning Notice or a Termination Notice otherwise than under clause 5.A, the Academy Trust may continue during the notice period to admit pupils to the Academy (unless the Secretary of State specifies otherwise), and to receive GAG and EAG, in accordance with this Agreement.

Notice of intention to terminate by Academy Trust

5.S The Secretary of State will, before the start of each Academy Financial Year, provide the Academy Trust with a final funding allocation indicating the level of GAG and EAG to be provided in the next Academy Financial Year (the **"Funding Allocation").**

5.T If the Academy Trust is of the opinion that, after receipt of the Funding Allocation for the next Academy Financial Year (the "**Critical Year**") and after taking into account all other resources likely to be available to the Academy, including other funds that are likely to be available to the Academy from other academies operated by the Academy Trust ("**All Other Resources**"), it is likely that the cost of running the Academy during the Critical Year would cause the Academy Trust to become insolvent (and for this reason only) then the Academy Trust may give written notice of its intention to terminate this Agreement on 31 August before the Critical Year.

5.U Any notice given by the Academy Trust under clause 5.T must be provided to the Secretary of State within six weeks of the Secretary of State issuing the Funding Allocation. The notice given by the Academy Trust under clause 5.T must specify:

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

a) the grounds upon which the Academy Trust's opinion is based, including:

i. evidence of those grounds;

ii. any professional accounting advice the Academy Trust has received;

iii. a detailed statement of steps which the Academy Trust proposes to take to ensure that the running costs of the Academy are reduced such that costs are less than the Funding Allocation and All Other Resources, and the period of time within which such steps will be taken; and

b) the shortfall in the Critical Year between the Funding Allocation and All Other Resources expected to be available to the Academy Trust to run the Academy and the projected expenditure on the Academy; and

c) a detailed budget of income and expenditure for the Academy during the Critical Year (the "**Projected Budget**").

5.V Both parties will use their best endeavours to agree whether or not the cost of running the Academy during the Critical Year would cause the Academy Trust to become insolvent. Both parties recognise that they will need to engage in a constructive dialogue at the time about how best to provide education for the pupils at the Academy and use their best endeavours to agree a practical solution to the problem.

5.W If no agreement is reached by 30 April (or another date if agreed between the parties) as to whether the cost of running the Academy during the Critical Year would cause the Academy Trust to become insolvent, then that question will be referred to an independent expert (the "**Expert**") for resolution. The Expert's determination will be final and binding on both parties. The Expert will be requested to specify in his determination the amount of the shortfall in funding (the "**Shortfall**").

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

5.X The Expert will be an insolvency practitioner with significant professional experience of educational institutions or academies. If the parties fail to agree upon the appointment of the Expert then the Expert will be appointed by the President of the Institute of Chartered Accountants in England and Wales. The Expert's fees will be borne equally between the parties.

5.Y The Expert will be required in reaching his determination to take account of advice from an educational specialist who is professionally familiar with the issues arising from the budget management of schools. If the parties fail to agree upon the appointment of the educational specialist then the educational specialist will be appointed by the Chairman of the Specialist Schools and Academies Trust (or any successor or equivalent body). The educational specialist's fees will be borne equally between the parties.

5.Z If the Expert determines that the cost of running the Academy during the Critical Year would cause the Academy Trust to become insolvent, and the Secretary of State will not have agreed to provide sufficient additional funding to cover the Shortfall, then the Academy Trust will be entitled to terminate this Agreement, by notice expiring on 31 August before the Critical Year. Any such notice will be given within 21 days after (a) the Expert's determination will have been given to the parties or (b), if later, the Secretary of State will have given written notice of his refusal to provide sufficient additional funding for the Academy to cover the Shortfall.

Effect of termination

5.AA If this Agreement is terminated, the Academy will cease to be an Academy within the meaning of sections 1 and 1A of the Academies Act 2010.

5.BB Subject to clauses 5.CC and 5.DD, if the Secretary of State terminates this Agreement under clause 5.A, he will indemnify the Academy Trust. If the Secretary of State terminates this Agreement otherwise than under clause 5.A, he may at his discretion indemnify or compensate the Academy Trust.

5.CC The amount of any such indemnity or compensation will be determined by the Secretary of State, having regard to representations made to him by the

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

Academy Trust, and will be paid as and when the Secretary of State considers appropriate.

5.DD The categories of expenditure incurred by the Academy Trust in consequence of termination, for which the Secretary of State may indemnify the Academy Trust under clauses 5.BB, may include:

a) staff compensation and redundancy payments;

b) compensation payments in respect of broken contracts;

c) expenses of disposing of assets or adapting them for other purposes;

d) legal and other professional fees; and

e) dissolution expenses.

5.EE If this Agreement is terminated, and the Academy Trust owns capital assets which have been partly or wholly funded by HM Government, the Academy Trust must, as soon as possible after the termination date:

a) transfer a proportion of those capital assets, equal to the proportion of the original financial contribution made by HM Government, to a nominee of the Secretary of State to use for educational purposes; or

b) if the Secretary of State directs that a transfer under clause 5.EE(a) is not required, pay to the Secretary of State at the termination date (or, by agreement with the Secretary of State, at the date of their subsequent disposal) a sum equivalent to the proportion of the original financial contribution made by HM Government.

5.FF The Secretary of State may:

a) waive all or part of the repayment due under sub-clause 5.EE(b) if the Academy Trust obtains his permission to invest the sale proceeds for its charitable purposes; or

b) direct the Academy Trust to pay all or part of the sale proceeds to the relevant LA.

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

6. OTHER CONTRACTUAL ARRANGEMENTS

Annexes

6.A Any annexes to this Agreement form part of and are incorporated into this Agreement.

The Master Agreement

6.B Except as expressly provided in this Agreement, all provisions of the Master Agreement have full force and effect.

General

6.C The Academy Trust cannot assign this Agreement.

6.D Failure to exercise, or a delay in exercising, any right or remedy of the Secretary of State under this Agreement (including the right to terminate this Agreement), or a single or partial exercise of such a right or remedy, is not a waiver of, and does not prevent or restrict any initial or further exercise of, that or any other right or remedy.

6.E Termination of this Agreement will not affect the accrued rights, remedies, obligations or liabilities of the parties existing at termination.

6.F This Agreement may be executed in any number of counterparts, each of which when executed and delivered shall constitute a duplicate original, but all of which will together constitute the same agreement.

6.G This Agreement and any dispute or claim arising out of or in connection with it or its subject matter or formation (including non-contractual disputes or claims) shall be governed by and construed in accordance with the law of England and Wales, and submitted to the exclusive jurisdiction of the courts of England and Wales.

Information Sharing with Local Authorities – Statutory Responsibilities

6.H The Academy Trust must provide:

a) the name, address and date of birth of the pupil or student;

Docusign Envelope ID: 8F2555A1-A119-42C8-95E3-BB01B5A44A90

b) the name and address of a parent of the pupil or student;

c) information in the institution's possession about the pupil or student (except if the pupil or student concerned (in the case of a pupil or student who has attained the age of 16) or a Parent of the pupil or student concerned (in the case of a pupil or student who has not attained the age of 16) has instructed the Academy Trust not to provide information of that kind);

upon request under section 14 of the Education and Skills Act 2008 from a local authority (for the purpose of enabling or assisting it to exercise its functions under Part 1 of that Act); or

upon request under section 72 of that Act from a body providing services under sections 68 or 70(1)(b) of the Act (for the purposes of providing such services).

Department for Education

© Crown copyright 2020

You may re-use this document/publication (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence v2.0. Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

To view this licence:
visit www.nationalarchives.gov.uk/doc/open-government-licence/version/2
email: psi@nationalarchives.gsi.gov.uk.

We welcome feedback. If you would like to make any comments about this publication, please email AFSPD.feedback@education.gsi.gov.uk, quoting the title of this document. Specific project queries should be sent to the allocated project lead/lead contact.

About this publication:
enquiries www.education.gov.uk/contactus.
download www.gov.uk/government/publications.

Reference: DfE-00215-2020

Follow us on Twitter: @educationgovuk

Like us on Facebook: facebook.com/educationgovuk