Lumen Learning Trust

Are You ready to join us?


we believe
that the first
years of a child's
education are precious
and should be filled
with a joy of
learning.

Hello

The world and the subsequent demands placed upon our young people is perpetually evolving and we are preparing them for these challenges in a supportive, committed and dynamic way. We continuously reflect on and develop the way in which we work as individual schools and as part of the wider Trust to ensure our children receive exemplary teaching and learning experiences throughout their time with us. This is only possible because of our committed and exceptional staff and schools.

Every community school should be at least Good. No family should feel they have to travel or move house to be able to go to the 'good' local school. The process of building and maintaining a school in this position is not for the fainthearted and requires a formidable team of dedicated and passionate members who are willing to strive for improvement at every turn. The unique characteristics and strengths of our schools are our most important asset in this pursuit and we could not accomplish what we do every day without them.

We embrace schools wishing to join us who believe they have a part to play in securing our future generation's life chances. Our experience and success has been rooted in our ability to talent-spot and harness capacity wherever it is and turn it into an opportunity to enable our children's futures.

Are You ready to join us?

we understand the pivotal role pre-school and primary provision plays in our children's future success as adults.

Mary Ellen McCarthy
CEO,
Lumen Learning Trust

Our Origins

In February 2010 Saxon Primary School, based in Shepperton, achieved an Outstanding judgement at Ofsted for leadership and management and began to support vulnerable schools both locally and further afield. In doing so, Saxon's team were drawing on their own experience of taking Saxon from a school in Special Measures in 2007 to a school in such a position of strength that it gained sponsorship status from the DfE in June 2013.



Lumen Learning Trust was established in Autumn 2013 as a natural development of the school-to-school support carried out by the leadership team at Saxon Primary.

Today, our support for other schools is enhanced by the experience and skills of a number of our team; our CEO, Mary Ellen McCarthy carries out extensive support for school leadership teams in Surrey schools and beyond; 2 Senior Leaders are experienced in inspection practice and we have a number of Trust and school leaders offering specialisms in Early Years, English, Maths, ICT, PE, Behaviour Management and Curriculum Leadership.

Our Vision

By providing a firm foundation through primary education, we are enabling our children to achieve the qualifications they need to gain the employment they want.

Lumen Learning Trust puts the children's needs at the heart of its provision. We are committed to enabling children become successful lifelong learners and happy, fulfilled adults who can make positive choices about their future.

Our Commitment

Schools are duty-bound to do all they can to enable their pupils to acquire a relevant and rounded repertoire of skills so they can enjoy real choice regarding how they live their lives and understanding their responsibility in terms of supporting the wider community. We understand primary schools are the beginning of this journey and so we have a particular part to play in securing these positive outcomes.

We are steadfast in supporting and collaborating with other schools in the development of learning and leadership to create a stimulating and rewarding environment for the whole community.

Developing Leadership Capacity

Strengthening Classroom Provision

Realising Potential

Our Guiding Principles

We are unwavering in our pursuit of working together in partnership with families, other schools and external agencies in order to strengthen our provision and secure that success. Our expertise lies not only in teaching and learning provision from ages 2-11 but also in our holistic support for families offered by our Pastoral Support Team.

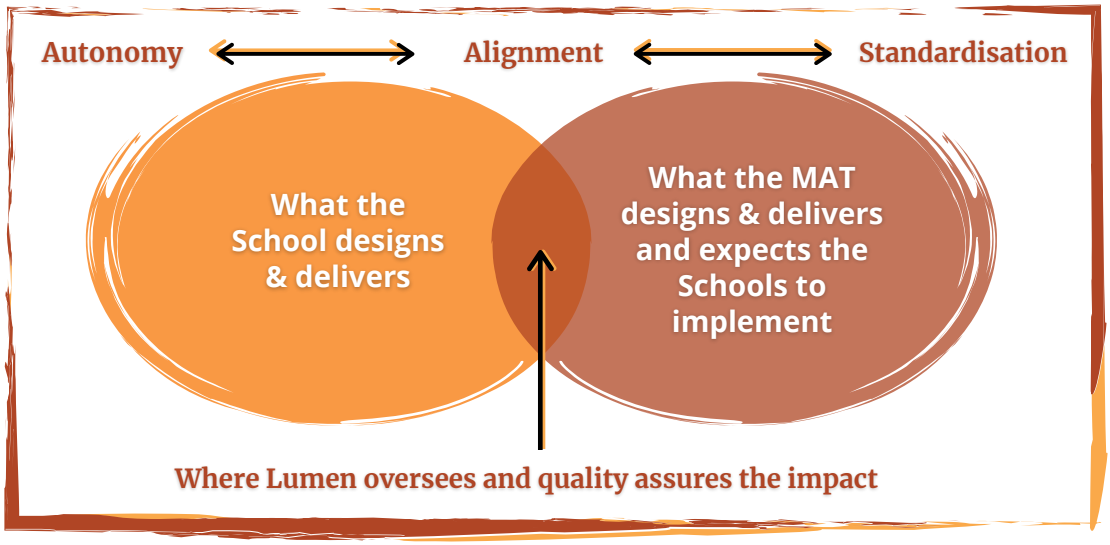
Governance Structure

Governance at Lumen Learning Trust follows statutory, regulatory and best practice to ensure effective support, checks and balances to the operations of the Trust.

We are unashamedly ambitious, not only for our children but also for all of our staff.

When creating the Trust, the leadership wanted to have a balance between school autonomy and standardisation. From the outset it was agreed that the local school leader should be a Headteacher and not a Head of School. We are always keen to foster the uniqueness of each school in its local context, whilst working collaboratively within the Trust's family of schools and Central Team to achieve time and efficiency savings in areas where a duplication of effort is counterproductive.

How does it all fit together?



Trustees have an overarching role across the whole of the Trust and work with the executive leadership and central team to make decisions about the Trust's vision and values and make strategic plans to ensure these are realised. They meet as a board and through committees to consider all aspects of Trust planning, from agreeing a budget, to setting Trust policies. To strengthen insight and scrutiny, each school's Chair of Governors automatically becomes a Trustee once they take on the role of Chair.

Members have a limited role. They are often described as 'eyes on, hands off'. They can appoint and remove Trustees and they appoint the independent auditors. If everything went very wrong in the Trust the Regional Schools Commissioner can approach Members to take action to remove Trustees and appoint some more.

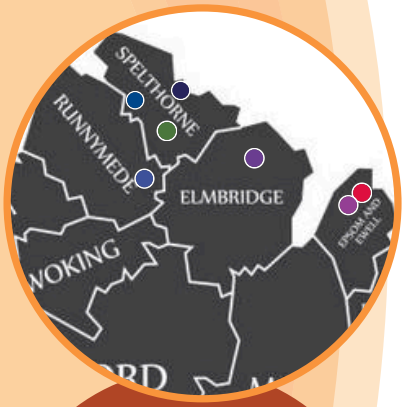


Local Governors have an advisory role. They are the eyes and ears of the Trustees. It is not possible to have the local knowledge that the Local Governors can provide. They visit the school to provide triangulating evidence to the Trustees about the quality of the provision. Their role is to provide both support and challenge to the school leadership.

All Trustees and Local Governing Body meetings are attended and minuted by the Trust Governance Professional.

Our Schools

Lumen Learning Trust is more than just a collection of primary schools – it is a family of like-minded individuals with a relentless focus on securing the best possible outcomes for every child in their care.



We understand that children can only achieve their best when they feel safe, happy and secure.

The Trust is rightly proud of its seven member schools:

Saxon Primary in Shepperton, a 2-form intake from Nursery to Year 6.

Where Lumen Learning Trust began in 2013, Saxon Primary School is dedicated to fostering an inclusive culture that respects, values and celebrates the contributions of all children. Their mindful approach to learning ensures they are empowered to be resilient, confident and informed global citizens.

Saxon last underwent a full inspection in June 2015 and achieved Outstanding for Leadership and Management and Good for all other areas.

The Echelford Primary in Ashford, a 3-form intake from Reception to Year 6.

Echelford is an inclusive and nurturing primary school, committed to enabling opportunities for every child to discover confidence, develop independence and build resilience so that they realise their own unique value and can thrive both in our community and beyond.

Echelford joined the Trust in October 2013 after being placed in Special Measures in November 2012. By their next inspection in November 2016 the school achieved Good in all areas.





Riverbridge Primary in Staines-upon-Thames, a 3-form intake from Nursery to Year 6.

Riverbridge is passionate about developing a desire for learning and promoting independence within all the children in their care. A learning environment that is ever evolving and designed to be challenging and motivating, the school values the potential in all children and encourages a growth mindset for all.

Riverbridge joined the Trust in September 2016 after being placed in Requires Improvement by Ofsted. By the next inspection in June 2019 the school achieved Good in all areas.

Walton Oak Primary in Walton-on-Thames, a 2-form intake from Nursery to Year 6.





Walton Oak is a welcoming, diverse and stimulating school. By placing great emphasis on ensuring every child's needs are met, their abilities are understood and their aspirations encouraged, children experience a truly rounded educational experience.

Walton Oak joined the Trust in April 2019 after carrying out a thorough review of possible trusts they could join in order to reap the benefits of being part of a family of schools. Their first Ofsted as an academy in July 2023 saw them achieve a Good rating.

Darley Dene Primary in Addlestone, a 1-form intake from Nursery to Year 6

At Darley Dene, every aspect of the school's provision is centred around the children. Every child is treated with unconditional positive regard and their unique worth and individual life experience is championed by school staff in partnership with the child's family and from the strength of that partnership, children thrive.

Darley Dene joined the Lumen fold in September 2019 after being placed in Special Measures following an inspection in June 2019. Their first Ofsted as an academy in July 2024 saw them achieve a Good rating in all areas.

Ewell Grove Primary in Ewell, a 2-form intake from Nursery to Year 6.

At Ewell Grove, a thriving and vibrant village school, they champion every child's right to receive a high-quality education within their local community. They aim for excellence in every aspect of school life, from academic achievements to social interactions, creating an environment where children can truly flourish.

Ewell Grove Primary joined the Trust in November 2024 after carrying out a thorough review of possible trusts to join, keen to experience the benefits shared by Walton Oak and Darley Dene in recent years. Their last Ofsted in January 2022 saw them achieve Good in all areas.



Southfield Park Primary in Epsom, a 2-form intake from Recpetion to Year 6.

At Southfield Park, a modern and welcoming site in a green and residential area of Epsom, they provide opportunities to develop interests, break through barriers, increase resilience and ensure that every child is inspired to have high aspirations.

Southfield Park Primary joined the Trust in November 2025, keen to experience the benefits shared by Ewell Grove the previous year. Their last Ofsted in January 2023 saw them achieve Good in all areas.

We are at the forefront of developing environments to ensure the joy of teaching and learning extends beyond the traditional classroom and into immersive learning spaces.

Partnership Working

Whilst we operate as a multi academy trust, all partner schools are involved at Trusteeate level as all partner schools' Chairs of Governors are automatically Trustees of the Trust. Each of our partner schools have their own headteacher, leadership team and governing body.

We believe education is the 'engine room' to a strong economy.

By having each school's Chair of Governors as a member of the Board of Trustees, we are able to draw on the strengths of all our schools and ensure all schools are able to play their part in decision-making for future roles and developments of the Trust as a whole.

We are constantly looking to build capacity in the schools we are supporting in order to enable them in turn to offer support to other schools. Coupled with real commitment to continuing professional development, we feel we are working with a sustainable model which continues to enhance the outcomes for children in our schools and beyond.

In addition to working with other schools we have extensive and established working partnerships with external agencies including:

SCITT Teacher Training programme

All our Trust schools host SCITT candidates operated by Surrey South Farnham College, a primary Initial Teacher Training partnership graded by Ofsted in March 2014 as an 'Outstanding' provider in all areas. It is nationally recognised within the DfE to be at the forefront of school based training through the effective delivery of School Direct and Postgraduate Apprenticeship programmes.

SFET Teacher Training Hub

We are Delivery Partners for the comprehensive ECT programme for teachers starting out on their career.

Forest Schools

Nature-based communities within each school where in-house, trained practitioners nurture learner led exploration and discovery and create meaningful experiences for positive lifelong impact.

External Consultants

Where appropriate and in response to specific school improvement and professional learning needs, we commission targeted work with specialist external consultants.







We pride ourselves on knowing and understanding every pupil so that we can craft our provision to meet their needs.

Making the Difference Together

We are committed to supporting and collaborating with other schools in the development of learning and leadership to create a stimulating and rewarding environment for the whole community.

we have a creative, solution-focused outlook and welcome schools that also work in this way.

What we can learn from you

Your school will enhance the work of all schools in the Trust, thus ensuring that your influence on learners can extend far beyond the walls of your classrooms. We will celebrate, share and implement your best practice across our family of schools.

What we will bring you

Practitioners supporting practitioners is the most effective way of strengthening provision - not just in the school requiring support but also for the school providing the support.:

Lumen Learning Trust is able to offer you:

- Extensive expertise in primary provision in three key stages - EYFS (including pre-school), KS1 and KS2;
- 2 Senior Leaders experienced in inspection practice;
- School and Trust leaders offering specialisms in Early Years, English, Maths, ICT, PE, Behaviour Management and Curriculum Leadership;
- Pastoral Support Co-ordinator with extensive social work experience, supporting local teams of Home School Link Workers and Emotional Literacy Support Assistants;
- Leadership teams experienced in working alongside colleagues both in Senior Leader and Middle Leader roles;
- Strong links with local secondary schools;
- Experienced governors and trustees;
- Sport Premium mentor team supporting every Lumen school;
- A core Central Team providing support to school's leadership teams in operational, personnel, procurement and financial services matters.





This service offering allows us to help you to:

Develop strong and effective teaching through curriculum reviews and the sharing of good practice as well as embracing the fundamental aim of supporting teaching professionals to allow them to deliver exemplary teaching and learning experiences for all children.

Personalised school specific support in an environment where highly motivated and talented individuals are trusted with autonomy and have the respect of their peers, enabling consistently excellent delivery of services. Leaders are empowered to continually and creatively explore new ways of working to strengthen service provision.

Trust networks and collaboration including Lumen-wide year group seminars sharing good practice and through collaboration the opportunity to influence direct positive change in teaching and learning across Lumen through the building of peer networks.

Community and external resources further enhance each school's offering be it expertise to support staff wellbeing, operational support from our Central team or Trust leadership development opportunities.

High quality professional learning and career development including mentorship and coaching for new Leaders, accelerated career development for ambitious teachers and opportunities to work in schools across Lumen to share expertise and best practice as well as with our Central team on a wide range of projects to affect a meaningful, positive impact.

What our central structure can offer your school

Fundamentally, the team is responsible for ensuring the sustainability and development of every member school and to enable the Trust to run smoothly, efficiently and effectively in the delivery of its vision and guiding principles. A detailed structure of the central management team will be provided to you for clarity around the service and team members.

What characterises the Central team?



- A positive, solution-focused attitude centred on achieving the best outcomes for pupils in an increasingly challenging financial and operational climate;
- An unwavering commitment to representing and promoting the Trust's values internally and externally;
- Acting as a champion for change and improvement, constantly enhancing quality;
- Considerable personal integrity and team cohesiveness to deliver consistently and successfully.

Education, we believe, is the basis for a secure and brighter future

Key service provision available to your school

When your school joins us there are a number of centralised specialist services immediately available to support you operationally so you can concentrate your resources exactly where they are needed - delivering exemplary teaching and learning.

Centralised recruitment management

- Recruitment processes including creation of job descriptions, advertising using a variety of media channels, implementation of interview days, communication with applicants and collation of applications and shortlisting;
- Pre-employment processes including the gathering of candidate documentation, safeguarding and social media checks and onboarding.

Comprehensive HR support

- The Trust buys into specialist HR support covering all aspects of education HR including access to HR consultants, policies, resources and templates.
- Disciplinary, capability and grievance procedural support;
- Probationary period problem solving;
- Management of training requirements and training records;
- Full payroll processing via a fully managed payroll and pension administration service;
- Internal and statutory payroll and pensions reporting;
- Monthly third-party payments e.g. HMRC, pension schemes.

Health & Safety management

- The Trust buys into a health and safety support service covering all aspects of the schools' operations;
- Access to a designated, qualified health and safety consultant;
- Full school health and safety audits (via the Trust Risk Protection Arrangements insurers);
- School action plan creation and management based on risk assessments.



Leadership development at all levels

- Acquisition of accredited NPQH, NPSML and NPQSL qualifications are championed;
- Support to pursue personal professional development goals e.g. Ofsted inspector accreditation.

Centralised marketing and communications



- Overarching accountability for school websites as well as social and print media, working closely with local school teams to ensure an individual school's identity is maintained;
- Creating and implementing an effective central communication and marketing strategy;
- Assistance in managing any media enquiries including the provision of press releases and media scripts.

Governance expertise and management

- Board of Trustees providing robust challenge to ensure strong and sustainable educational performance and financial management;
- Governance Professional provision for local governance in all areas including recruitment, day to day management and statutory responsibilities.

Risk Management

- Fully comprehensive risk registers;
- Preventing and reducing fraud and irregularities;
- All schools buy in to a comprehensive Risk Protection Arrangement through the DfE which provides cover for insurance and cyber security.

Data & IT Support

- Connected IT to ensure parity and total accessibility combined with bespoke solutions to meet the needs of each school;
- Tender and procurement management.

Policy Management

- All policies managed and tracked to allow schools the space to concentrate on teaching and learning;
- Ensures version control but with enough scope to allow schools to tailor their approach based on the needs of their cohorts;
- Personalised templates created for schools to provide time savings as well as consistency of approach.



Finance Management and income generation

- A team with a wealth of experience managing school budgets who provide full support to each school;
- Ensuring consistency in all areas of auditing and reporting, making sure all schools meet statutory requirements;
- Continuous focus on best value for money in any formal supplier agreements.

Data Protection compliance

- Designated Data Protection Officer (DPO) from a recognised external agency;
- Robust internal Data Manager support, including maintenance of an extensive resource database and problem solving;
- Training and awareness of staff;
- Implementation of compliant systems and processes, including all policy creation and management;
- Reviewing and advising on third party suppliers data protection adherence;
- Full support with Subject Access Requests (SARs) and Freedom of Information requests (FOIs).

Facilities management

- A Facilities Manager and Officer who coordinate school caretakers to ensure school environments are maintained to a high standard and benefit from further development over time;
- Creation and management of cyclical works programmes as well as bespoke maintenance and inspection schedules;
- Support with Condition Improvement Fund (CIF) bid submissions;
- Building project management;
- Asset management plan monitoring.

Collaborative procurement driving economies of scale

- Achieving economies of scale in all areas including catering, cleaning, IT and compliance;
- Generating savings which are reinvested into teaching and learning;
- Central management with all schools having input to any decisions taken;
- Securement of discounts and pricing which are passed on to all schools;
- Review of contractual responsibilities.



Legal and HR advice and support

- All schools supported via comprehensive service level agreements with external professionals.



Every community is unique and the school serving it should respect and reflect that individuality; one size does not fit all.

Next Steps

Any school interested in joining Lumen Learning Trust would talk to representatives of the Trust about practicalities of how a partnership would work, and check that their school and the Trust hold common values in their approach to education. If there was an interest in exploring this further, we would form a working group to work with representatives of your school for both parties to reassure each other of our financial, estate and performance health. This is absolutely a two-way process.

Once we enter into due diligence, it is expected that, subject to any material issues arising, it is the intention that your school will join Lumen.

Due Diligence

Due diligence is the process by which the joining school and the Trust gather information about each other to ensure the integration process proceeds smoothly. In particular, it is used to identify risks, liabilities, cultural differences and practical issues that may cause difficulties later.

The key objectives are:

- To test the strategic rationale for the partnership: will it improve the life chances and attainment of pupils and is it really financially and operationally attractive for both sides? What are the prospects for the future? Do the partners have the capacity and capabilities to ensure success for all stakeholders?
- To inform discussions, identify liabilities and make sure the legal documents pick up risks and allocate them appropriately by using warranties and indemnities (legal clauses which require one party to compensate the other if a risk materialises and costs are thereby incurred). The general rule is that liabilities whose origin is pre-transfer belong to the transferor (local authority and/or diocesan trustees), and those whose origin is post transfer belong to the transferee (the MAT).
- To lay the foundations of the future integrated organisation and build its culture. The process should combine an 'outside in' approach with an 'inside out' approach to understand the schools' relative position in the local education system, as well as understanding the internal capabilities, strengths and weaknesses.
- To examine broader issues of culture, systems and processes, management structures, future opportunities and business plans.



Your due diligence on Lumen Learning Trust

It is important that you look at our Trust to provide yourselves with assurances that our values align with your school's vision and the direction you want to go in. Whilst we support you through the process, we can't do this element for you. However, we will provide you with a pack of information to get you started. You can then follow up with requests for further information, questions and meetings.





Our due diligence on your school

We will request documentation from you and we will visit your school to talk to your school team and governors.

Areas that will be included are:

- Educational performance and provision;
- Admissions and school capacity;
- Leadership and Governance;
- Staffing structure, job descriptions, contracts of employment;
- IT;
- Buildings and compliance;
- Finance;
- Marketing and communication.

More information on due diligence may be found at https://www.gov.uk/government/publications/due-diligence-in-academies-and-maintained-schools/due-diligence-best-practice-guide-for-maintained-schools-local-authorities-and-academy-trusts.

We will then prepare a report for our Trustees to enable them to make a decision about your school joining Lumen Learning Trust.

Timeline

The process of conversion is led by the DfE and our legal representatives. We will provide a detailed timeline to you when you formally register your interest to join our Trust.



FAQs

It is understandable you will have initial questions about the academisation process and what it means for your school. We hope the following information helps to frame the process before you decide to go any further.

By building a sense of shared values, goals and support Trust schools are helped to weather sector storms and increase resilience.

What are the risks of becoming a MAT and how have they been addressed?

This is what the due diligence process will explore to ensure that our Trust and your school both share the same commitment to the same shared vision of learning together for a brighter future. At the same time, the due diligence process will robustly examine the operational and financial health of your school so that any risk is known prior to conversion so it can be planned for and managed vigorously once conversion has taken place. It's all about ensuring there are no surprises for either party.

Why do this now?

The educational landscape is changing, spurred on by the Covid pandemic in 2020-21. Individual schools recognise there is strength in numbers with Trust leadership able to coordinate support in centralised functions, allowing local school leaders to concentrate on the teaching and learning happening in their school. When the leadership of the school gets stretched to the limits, the existence of a group of peers and central support makes the task feel easier and less lonely.

What is the leadership structure of the Trust?

The leadership structure within the Trust can be seen in our Governance Structure section and is the structure we apply regardless of the school that joins us.



Would our admission arrangements change?

In the summer of 2020 Lumen became an own admissions authority for in year transfers. Any school joining Lumen will also become responsible for their own in year admissions. Extensive support to introduce this new process as well as ongoing assistance by our Governance Professional including guidance notes and Trust-wide admissions team meetings means schools do not feel alone in this process.

Would changes be made to the curriculum?

Currently, Academies do not have to follow the National Curriculum and can set a curriculum that is more relevant to the needs of our children and the community. Our schools already have strong and effective aligned curriculum frameworks however we appreciate it is not a "one size fits all". If existing curricula in joining schools are proving successful - evidenced by the pupil outcomes - then there is no expectation for a new school to mirror existing curriculum practice in the other schools.

How would our day to day life change?

For the children, it wouldn't, at least not in any noticeable way for them. Teaching in the classroom and the curriculum experience that your children and families have would develop positively to become aligned with Lumen's overarching principles. That said, in the case of schools where curriculum improvement is needed, and quickly, Lumen is very experienced in acting swiftly to enact those changes and to assist the school in managing their relationships with external stakeholders to garner buy in and trust.



For your staff, especially those in support roles, they will find that some day to day tasks will be absorbed centrally to allow them to concentrate on what is truly important for your setting. Of course, there will be some changes to operational processes but these will be positive changes that strengthen the school's capabilities with your school receiving extensive support in implementing and embedding them in your school.

Staff contracts will be transferred across to Lumen via the Transfer of Undertakings (Protection of Employment) Regulations (TUPE) with the same employment terms and conditions that they currently have and points of contact will not change for families.

Therefore, the change to a MAT, for the vast majority of people, will not result in any obvious immediate changes.

How would we receive our funding and is there a Partnership Contribution?

Funding to the schools within a MAT is allocated on an individual academy basis. Funding is governed through a master funding agreement between the Secretary of State and the MAT and a supplemental agreement between the Secretary of State and each school within the MAT.

Most funding for the running of academies comes from the general annual grant (GAG). This is paid to academies by the Education and Skills Funding Agency (ESFA), based on a formula provided by the local authority. All schools continue to receive capital funding. Academies can apply for additional capital funding through the Condition Improvement Fund.



The Trust is funded by contributions from Trust schools and external fundraising/grants. A three week summer camp for our children and local community based at one of our schools each year, is one example of how income is generated. Our central team and service provision is funded by a percentage contribution from each school within the Trust, charged out to schools on a per pupil basis. This is a fair and transparent method ensuring diseconomies of scale are addressed. Further details on this will be provided during the initial informal discussions.

The core objective of this centralised model is to bring economies of scale which also deliver the best possible quality. One key commitment to all schools is that the perceived value of support, resources and services we provide should outweigh each school's individual financial contribution to the Trust.

Would our school continue to access services from the Local Authority?

The school would still have the option, as they currently do, to 'buy in' a number of services from the Local Authority. As more schools become MATs, the provision of services from the Local Authority is going to decrease. Our proposal would be that the Central Team in the MAT will be focused on purchasing the best services for the children at the best value. Services offered by the Local Authority will continue to be considered as part of our proposal.

Who would own the land and buildings?

At the point of a new academy conversion, the Trust would take over any lease for the land and buildings from the relevant freeholder, e.g. the Local Authority.

Would our school have to change its name?

Part of what makes us great is the individual identities each of our schools has. Your name would not change (other than adding the word 'Primary' to your school name if you don't already use this), unless of course you feel that conversion is the ideal time to act as a 'circuit-break' and introduce any changes to your school identity.

Over time your school logo would be changed to match the design theme that permeates all that we do across the Trust and our schools. Any change would be done sympathetically, retaining your school's colour and any motifs that are intrinsic to your school. Any changes would be presented to children, staff and your family community to gather their thoughts and gain their buy in before anything is implemented. Our Central team would extensively support you in communications, design work and ensuring all communication channels reflect whatever changes are made.



Who makes the final decision?

Any decision on a school joining our Trust would be made by Lumen's Trust Board of Trustees/Trustees.

Please do refer to our Trust and school websites for more information about our Trust www.lumenlearningtrust.co.uk.

More information on 'why join a trust' can be found at https://cstuk.org.uk/knowledge/guidance-and-policy/starting-with-why-why-join-a-trust-and-why-a-trust-based-system/.


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