



External review of governance

Commissioned by ESFA and North West Regions Group

Broughton Jewish Cassel Fox SAT

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Trust	Broughton Jewish Cassel Fox
Chair	David Bondt
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Commissioned by	Leon Dannatt (RG) and Sarah Lill (ESFA)
Date review commenced	20 December 2022
Reason for the review	
<ul style="list-style-type: none"> • This review was recommended by the SRMA who is providing financial support and guidance for the trust and commissioned by ESFA and North West Regions Group. There is a relatively new chair of the trust board and several new trustees have been appointed. The review will provide understanding and assurances of the systems and processes in place and any improvements that can be made. 	
Background information	
<ul style="list-style-type: none"> • Broughton Jewish Cassel Fox is a single-academy trust incorporated in September 2012. It comprises one primary school with over 400 pupils on roll and is situated in the Salford area of Manchester. The principal has been in post for over 12 years. • The trust's aim is to promote traditional Jewish values whilst delivering the highest standards of Kodesh and secular studies to enable them to take their place as observant Jews in the modern world. • Classes are mixed, although boys and girls are separated for Kodesh studies. Headline performance at the end of KS2 in 2022 was above national average: 66% pupils achieved expected standard in reading, writing and mathematics combined (national average 59%). KS1 performance was less strong with handwriting presenting greatest challenge for pupils. • Funding is very tight but the school has managed to accrue a modest in year surplus whilst maintaining a small reserve. The trust has commissioned an SRMA to provide financial oversight and scrutiny. • The school had an ungraded inspection in December 2022 when it was judged to continue to be a 'good' school. • The trust board is considering the opportunities and challenges of joining a MAT as they strive to build financial sustainability. 	

The governance framework

	Name	Appointed by (ref articles)	Listed Companies House	Listed GIAS	Listed trust website
Members	1. Bernard Cohen	Members	N/A	Y	Y
	2. Dov Black	Members	N/A	Y	Y
	3. Anthony Jaffe	Members	N/A	Y	Y
Trustees	1. David Bondt (chair)	Members	Y	Y	Y
	2. David Mechlowitz	Members	Y	Y	Y
	3. Yehuda Fagleman	Members	Y	Y	Y
	4. Izzy Rosenburg	Members	Y	Y	Y
	5. Shlomie Graff	Members	Y	Y	Y
	6. Dani Mechlowitz	Members	Y	Y	Y
	7. Tamar Tabor	Members	Y	Y	Y
	8. Amir Ellituv	Members	Y	Y	Y
	9. Catherine Davies	Staff	Y	Y	Y
	10. Nicola Taylor	Staff	Y	Y	Y
	11. Nicola Jaysan	Staff	Y	Y	Y
	12. Bashy Rice	Parent	Y	Y	Y
	13. Yaacov Goldin	Parent	Y	Y	Y
Accounting officer	14. Alison Kaye	Members	Y	Y	Y
	15. Yehuda Pearlman	ex officio	Y	Y	Y

- a. The three-founder members of Broughton Jewish Cassel Fox continue to serve in post since the school academised in 2012.
- b. The board comprises 15 trustees (governors) all of whom are registered at Companies House and with GIAS; nine foundation trustees, three staff trustees and two elected parent trustee and the principal.
- c. There are five main standing committee of the board:
 - i. Quality of education
 - ii. Behaviour, attitudes and personal development
 - iii. Finance and resources
 - iv. Jewish studies
 - v. Admissions
- d. There is also a pay and personnel committee comprising three governors which is convened as required. (The trust prefers to use the term 'governors').
- e. The school's governance professional is Frances Bennett (One Education) who oversees all clerking arrangements.



The external review process

Activities undertaken in the course of this review include:

- Review of key strategic documents including the articles of association, the trustees' financial report and statements for year ending 31 August 2022, code of conduct, skills audit, scheme of delegation, SDP, SEF, minutes of board and committee meetings since January 2022, governor visit reports, Ofsted and Pikuach reports.
- Observation of full governing body meeting (20 December 2022)
- Review of website, GIAS, Companies House and key policies (Safeguarding, Safer Recruitment, Complaints, Behaviour, Equality and Diversity and PSED Objectives and Pupil Premium Strategy) to establish compliance.
- Review of key performance data.
- Tour of the school, including a visit to each classroom.
- Separate interviews with the principal and deputy headteacher, chair of trust board and vice chair, initial findings meeting with the full trust board including facilitated self-review session, feedback session with the principal and chair of trust board.

Compilation of ERG report and action plan.

Key message

- **The trust board is highly aspirational for the longer-term future of Broughton Jewish Cassel Fox and are aware that they need to develop a clear strategic business plan which will secure financial sustainability.**
- **Governors have been proactive in considering the benefits and opportunities of joining a multi academy trust and there have been discussions around what the 'best fit' would be in terms of philosophical, religious and educational values.**
- **There is a strong skills set and diversity of perspectives across the board, which combine to provide a culture of strong accountability and a determination to succeed as evidenced in the minutes of meetings. Governors ensure fidelity to their faith through promoting Jewish values whilst ensuring the highest standards of both Kodesh and secular studies.**
- **The recent Ofsted inspection (December 2022) was very positive about the school and noted how effective governance was in providing support and challenge to leaders. This has not only helped drive improvement in terms of pupil progress but also in practical ways designed to support staff wellbeing such as the reconfiguration of internal space to provide for a much-needed new staffroom.**

- **Governors are wholly invested in the school community and possess the skills and commitment to confidently address the challenges ahead. Their willingness to engage professional expertise e.g., SRMA and external school improvement partners coupled with their commitment to training and development will hold them in good stead.**

Findings

Findings are organised with reference to the DfE's Competency Framework for Governance and the six features of effective governance

1. Strategic leadership

- Leaders and governors have created a highly ambitious culture at Broughton Jewish Cassel Fox (BJCF) where pupils achieve well and in both Kodesh and secular studies. The trust's mission is to '*provide a balanced education which includes daily Kodesh and Chol Studies and a focus on positive character development*'. The values and beliefs are set out in the 'ideal BJCF graduate' which describes the behaviours, characteristics and skills which all pupils should aspire to. The clarity of expectations has helped shape excellent pupil behaviour and attitudes towards their work and each other which in turn has contributed to strong pupil outcomes. This is also reflected in pupil attendance which is considerably above the national average and not far short of pre-pandemic levels.
- As a small school SAT, governors are aware of the vulnerability this presents in terms of business continuity and are factoring this risk into their strategic planning. There is not a three-to-five-year strategic business plan setting out key objectives and this is something governors are keen to develop.
- Conversion to a MAT is a dynamic discussion piece amongst governors, with the principal actively seeking options to present to the board. However, finding the 'right fit' in terms of shared philosophies and aspirations, is a multi-layered and complex challenge and extends beyond the local region.
- Reducing admission numbers presents a risk to the financial sustainability of the school, hence careful consideration is being given to how numbers can be increased in nursery and the kindergarten to improve take-up in KS1. Governors are exploring marketing strategies within the local community to raise the profile of their early years offer.
- Governors have contributed to the setting of the annual school development priorities and are keen to monitor progress, especially in the curriculum areas identified by Ofsted where some subject leaders have not thought deeply enough about the key information pupils should learn.



- f. Governors are visible in school and are now considering realigning the link roles with a greater focus on the school development plan. They actively seek the views of stakeholders and are keen to hear pupil and staff voice. They have also built strong relationships with parents/carers and improved communications (e.g., 'weduc' app) which has contributed to a strong community allegiance across BJCF.

2. Accountability

- a. Data is shared in a format which is straightforward and easy to understand which enables governors to provide strong support and challenge as evidenced in meetings. Governors are confident in how they monitor pupil progress and are developing a forensic approach to groups e.g. performance of SEND pupils.
- b. They have been very supportive in practical ways such as targeting funding towards a new phonics scheme and ensuring there is funding to improve the quality and range of books in the library and also providing chrome books.
- c. Governors have exercised considerable support and oversight around financial accountability which has included restructuring and developing the finance team and repurposing rooms in order to provide office space where they can work together.
- d. They have also commissioned the ongoing support of an SRMA to provide insight and guidance around financial systems and efficiencies. This, along with close scrutiny of the monthly accounts, has helped the trust achieve an in-year balanced budget position. Governors have also supported a range of fund-raising activities.
- e. Governors are aware that they need to increase the trust's overall reserves and given that there is a reliance on voluntary contributions the financial position will continue to be a challenge unless revenue is increased and/or expenditures are reduced. Securing financial sustainability remains a trust priority.
- f. The principal's performance management has been reviewed with the support of an external consultant. Staff performance management is conducted by the principal who sets objectives aligned to key school priorities.

3. People

- a. The board undertakes an annual skills audit in the autumn term and uses this to identify gaps and help succession planning for key positions. There is a healthy diversity of perspectives on the board represented by a wide range of professional backgrounds which allows for challenging and thought-provoking discussions in meetings. Importantly, they are able to disagree without being disagreeable.
- b. Although the board has a full complement of trustees/governors it would benefit from the addition of a governor with experience of the MAT landscape. This



should be borne in mind when a vacancy arises although efforts should be made to access such expertise in the interim.

- c. The chair is hugely invested in the school and although relatively new in post he has worked hard to forge a strong relationship with the principal. They speak regularly outside of scheduled meetings and their professional relationship helps drive a collaborative work ethic for all board members.
- d. The chair has embraced the challenges of the role full on and is committed to leading the board's development. He has also developed a strong relationship with the vice chair who is keen to share the workload.
- e. The governance professional has provided organisational support in terms of legal guidance and compliance plus ensuring the timely circulation of agendas, minutes, papers etc.
- f. Governors acknowledge the challenges facing the trust and are highly committed to developing their skills and knowledge so that they can provide strong and assured strategic leadership over the years ahead.

4. Structures

- a. The trust has the three founder members appointed in 2012. The DfE's strong preference is that trusts should have at least five members (ATH 1.3) because:
 - I. this provides for a more diverse range of perspectives
 - II. ensures members can take decisions via special resolution without requiring unanimity
- b. There are currently 15 governors nine of whom are foundation governors, three staff, two elected parents and the principal who is also the trust's accounting officer. Rachel Baker is the school's business manager and chief finance officer.
- c. Governors understand the statutory roles and responsibilities of office and are keen to develop their skills and understanding so that they develop further as a cohesive strategic team.
- d. There are five main standing committees of the board each with a strong and experienced chair:
 - 1. Quality of education
 - 2. Behaviour, attitudes and personal development
 - 3. Finance and resources
 - 4. Jewish studies
 - 5. Admissions

5. Compliance

- a. The board has developed a stronger understanding of its legal, regulatory, contractual, and financial requirements, greatly assisted by the SRMA who has worked hard to ensure compliance and best practice. The register of business/pecuniary interests is up to date and uploaded to the school's website..
- b. Statutory policies on the website have dates of approval/ratification and/or review dates. It would be helpful to introduce a cycle of policy review.
- c. Governors actively promote a culture of inclusion and equality in school. The schools' objectives (Public Sector Equality Duty Objectives) have been referenced in the Equal Opportunities Policy and specifically articulate how they address protected characteristics.
- d. There is a link governor assigned for safeguarding which is afforded the highest priority by governors. There is also a SEND link governor and other link roles across the school. The link roles will be reviewed as part of a wider internal review of the board to ensure resources are targeted where they are most needed. Assigning a link governor to monitor the take up of pupil premium and the progress of disadvantaged pupils is strongly recommended.

6. Evaluation

- a. The SEF is presented to the full board at each meeting and is key to their discussions. The December board meeting observed by reviewer was held the week after the Ofsted inspection and because of the constraints of sharing information, was understandably curtailed in the depth and rigour of challenge around performance.
- b. The board benefits from feedback of external advisors who are able to validate the school's judgements – reflecting the principle of 'trust and verify'. This helps governors triangulate the school's internal assessment and evaluation.
- c. The board is planning a strategic leadership day ('away day') at the end of summer term which will include an evaluation of their progress against the actions/recommendations from this report.
- d. The governance professional has ensured a register of attendance at training is maintained and the board should consider planning an annual programme of relevant training to add structure to their development.

Recommendations (see action plan)	
<p>Strategic vision and trust priorities</p> <ul style="list-style-type: none"> • There is a planned away day to determine the trust’s three-to-five-year strategic plan setting out the roadmap to financial sustainability and ensure high quality provision for its pupils. • Outputs from the visioning exercise should include a limited number of strategic aims, key priorities, KPIs, milestones and monitoring arrangements. • Discuss the opportunities and challenges of joining a MAT setting out the non-negotiables in terms of philosophical and educational principles. <p>Holding to account</p> <p>In order to improve accountability of financial performance:</p> <ul style="list-style-type: none"> • Ensure financial scrutiny continues to be rigorous and explore all avenues for additional funding and income generation. • Identify those families who are eligible for pupil premium funding but are not claiming the grant • Governors should access general financial training through SRMA to provide additional financial monitoring and oversight. 	
Detailed actions to be undertaken	
See governance action plan	
Progress review	
TBC – within three to four months of the issuing of this report.	
Acknowledgments	
The reviewer would like to thank governors for their openness and honesty throughout this review. Thank you also to the principal for the delightful tour of the school.	
Date completed	14 February 2023