



Annual Performance Report

November 2023

**Dorset Centre of Excellence
Annual Performance Report**

Contents

1. Introduction.....	3
2. Context.....	3
3. Governance	3
4. Leadership	4
5. The Business Plan	4
6. Coombe House School	4
7. Ofsted	7
8. Additional Commercial and Community Activities	8
9. Commercial / Financial Position	12
10. People	12
11. Health and Safety / Facilities Management	13
12. Sustainability	14
13. PR / Reputation.....	14
14. Appendix One – Biographies	15

1. Introduction

The Dorset Centre of Excellence (the Company) is asked to report on its performance to the Shareholder annually and has been asked to provide its first report to the November 2023 Shareholder Committee Meeting so that it can be then shared onwards by that committee to a meeting of Full Council in December 2023.

2. Context

Following challenges when Coombe House School opened in May 2022, there were significant changes within the leadership and wider teams, reductions in pupil numbers and amendments to the plans for future admissions. The Company moved into a recovery phase, which included entering a state of enhanced cooperation with the Council.

From September 2022, an Interim Managing Director / Headteacher was in post leading the Company and Coombe House School. In October 2022, Ofsted visited to undertake an emergency unannounced inspection following receipt of some parental complaints regarding the schools' initial operating period. During this inspection, some Independent School Standards were found not to be met. The subsequent Ofsted report was published in December 2022, which was accompanied with formal correspondence from the Department for Education (DfE), who sought formal reassurance that plans to improve matters were robust.

This challenging period led to further consequences for the Company, its other intended commercial activities, and its ability to deliver the business plan.

3. Governance

Since the Company experienced the challenges described above, the Board of Directors has been significantly strengthened. With consolidation of its more established members and the initial addition of two Non-Executive Directors in September 2022 and a further three Non-Executive Directors in January 2023, under its chair, Ian Comfort, it has proved itself to be a strong and impactful body that has led a period of significant performance.

The Board has developed its committees, which consider school quality, finance and risk, and additional commercial and community opportunities. All committees, along with the wider Board, have led the Company forward to a more stable and positive position. During Ofsted's most recent regulatory visit to Coombe House School in June 2023 and its subsequent report published in September 2023, the effectiveness of the Board (the Proprietor) and their impact on governance were highlighted as a particular strength.

"Leaders, including the proprietor, have acted decisively and effectively to stabilise the school following some challenging first months."

(Ofsted June 2023)

Work to further strengthen the governance arrangements for the Company and School are ongoing to ensure that there is high quality support and challenge, close monitoring of compliance against the independent school standards and the expectations of the business plan.

4. Leadership

In the same period, the Executive has also been strengthened. A new Managing Director, Andy Holder, Senior Finance Manager, HR Manager and Facilities Manager all joined in the latter part of 2022 and together have assisted the Board to deliver significant progress.

As the Company seeks to develop and launch its residential social care offer, a further leadership line will be added. It is mindful of the potential challenges it is likely to face in its recruitment of suitably qualified and experienced social care leaders and so made provision within the approved business plan for an updated People Strategy, which will contribute towards overcoming these challenges.

5. The Business Plan

The Company welcomed Shareholder approval of its business plan in June 2023. Following the acceptance of the series of closely interconnected variables, came a commitment to review and update the wider arrangements that exist to ensure alignment with this updated plan. The working capital loan required to support the delivery of the business plan is in place and work to update the lease and commissioning agreement are ongoing.

Whilst the Company continues to work closely with the Shareholder to resolve the remaining foundational matters that exist between them (the updated lease and commissioning agreements), good progress is being made with the delivery of the business plan, which is ahead of target in terms of its financial position, the school roll and the additional commercial and community activities that had been detailed.

6. Coombe House School

Coombe House School operates in alignment with Dorset Council's Special Educational Needs and Disabilities (SEND) Strategy, which states "*we want our children and young people with Special Educational Needs and Disabilities (SEND) to be healthy, happy and safe, and able to achieve their potential to lead a fulfilling life.*" For the Company, the school is and shall always be the core of its business. All other activities will be developed with the understanding that they should complement and not unreasonably risk the successful operation of the school.

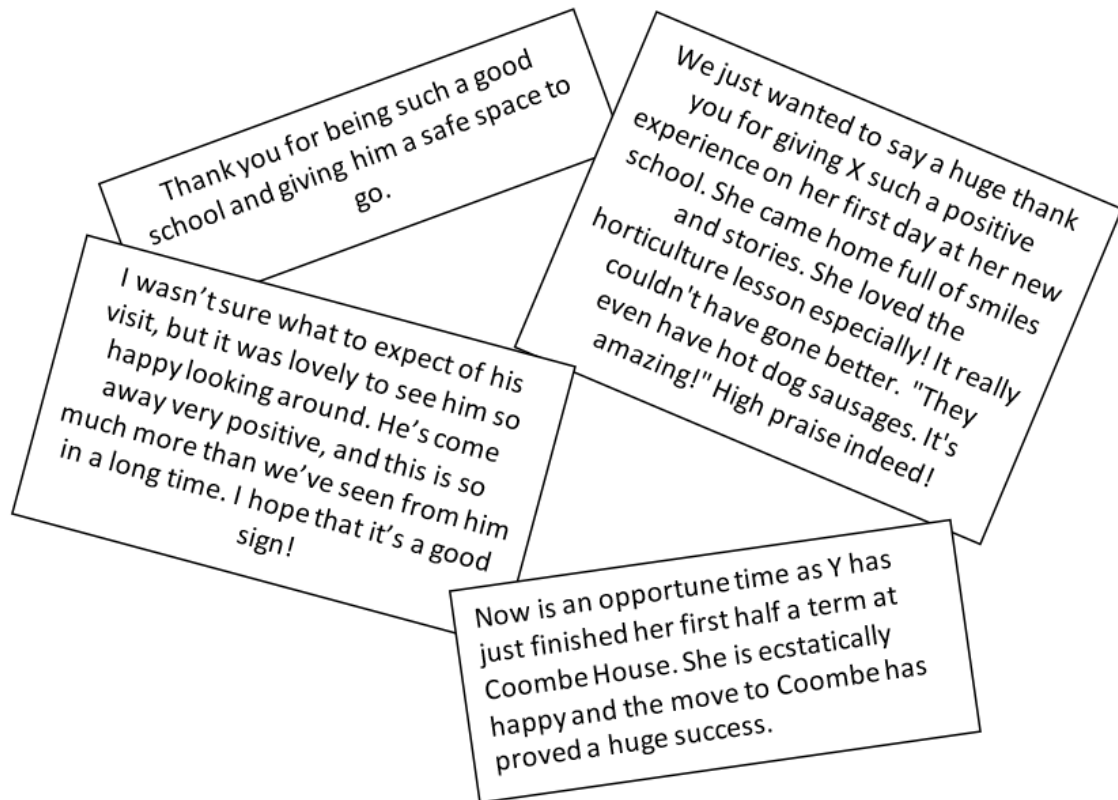
School leadership is strong and stable. A new Headteacher, Darren Harte, joined in February 2023 and was joined by a new Deputy Headteacher in June 2023. As the Company continues to develop its 'Schools within a School' model, further school leadership layers shall be added in line with the approved business plan.

The leadership team at the school welcomes the commitment to further develop the campus to allow for its growth and to ensure a high-quality curriculum offer through a 'Schools within a School' model.

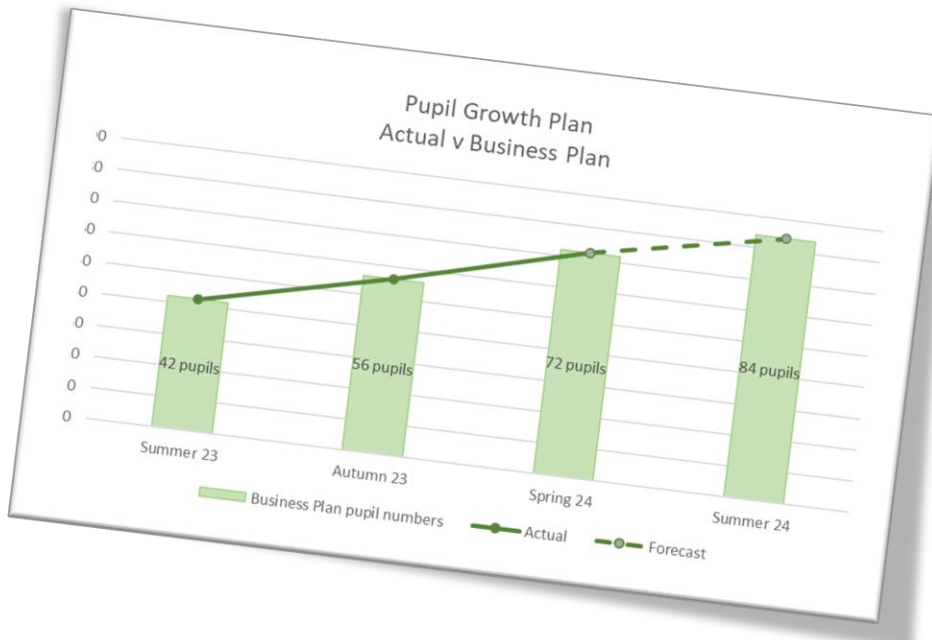
Schools within a School

As Coombe House School grows, it will retain a single registration but will operate as three different 'parts' that are spread across the campus. This operating strategy of placing children with others who will learn well together, and reducing the size of any single group of pupils significantly reduces risk. Many resources will be shared and accessible to all, but the model allows for both flexibility and an ability to manage what would otherwise be a large number of pupils in one single group.

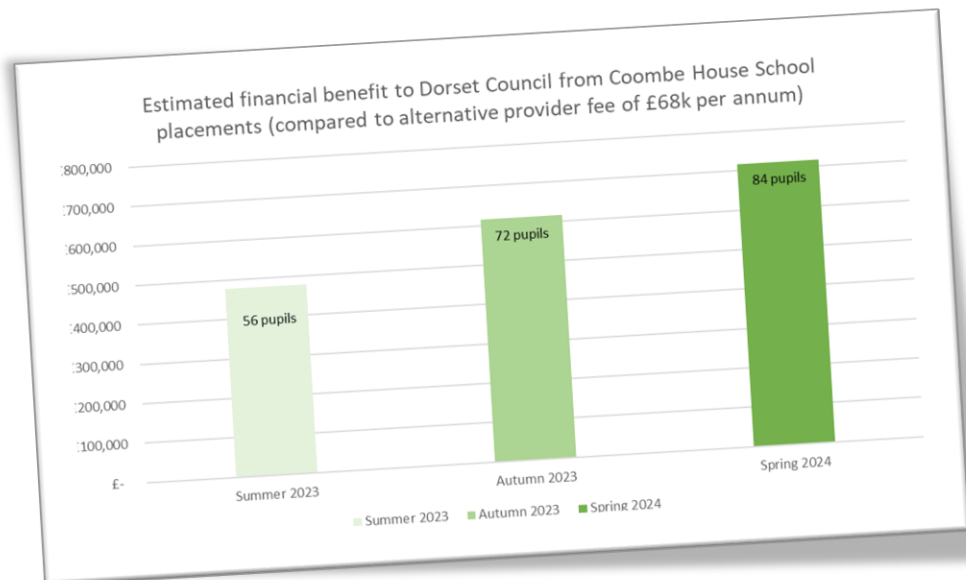
Parents and carers are increasingly choosing to feedback positively about their experiences, a selection of which is shared below.



The growth of the pupil roll at Coombe House School is on target and the admissions process is becoming more refined over time so that there is strong onward visibility on both sides about future intended commissioning patterns.



A significant intended outcome of the business plan was to provide savings compared to pupils at Coombe House School being placed at alternative independent special schools. Based on commissioned pupil places within the current financial year, potential savings for the Council for pupil fees is already significant. The chart below shows this indicative potential saving compared to pupils being placed with alternative independent special school providers with annual fees of £68,000.



The capital investment into the growth of Coombe House School supports the delivery of the Council's SEND Capital Strategy to increase the availability of local specialist places. It will provide spaces for pupils who are commonly placed with the more expensive independent special school providers and represents a growth in the number of available places for the pupils with the most common categories of need.

The next phase of classrooms that shall be made available to the Company are due by September 2024 and are likely to be similar in construction and design to the images below (which are of another similar development completed by the same contractor), with further classrooms being made available as part of a phased project.



7. Ofsted

Following the initial Ofsted visit in October 2022 detailed above, the most recent Ofsted inspection of Coombe House School found that new leaders have *“significantly improved the school in a short time.”* Inspectors visited the school in June 2023 and found that all the necessary (independent school) standards were met.

They wrote *“Since the last inspection, the proprietor has considerably strengthened the leadership of the school and the arrangements for governance. Leaders have the confidence of staff, parents and pupils.”*

Safeguarding was found to be effective with inspectors commenting that *“safeguarding underpins every aspect of school life.”*

During the inspection, pupils explained that they *“like their new school”* and *“see that staff want the best for them.”* The report explains that they have *“formed trusting relationships with staff who have a detailed understanding of their needs.”*

“I have been very pleased by the manner in which the school community has pulled together to ensure it develops a culture of continuous improvement. This report reflects the hard work of the team and pupils, who rightly deserve the positive comments within. Although inspectors agreed that there is more to do, the feedback from our pupils and their families was humbling and shows we are on the right path.”

Darren Harte, Headteacher

Whilst judgements for 'behaviour and attitudes', 'personal development' and 'leadership and management' were found to be good, inspectors agreed with the new leaders' assessment that the 'quality of education' required further improvement. Leaders continue to work through their development plans at pace to ensure the positive improvement trajectory is maintained.

The Department for Education (DfE) have written to the Company to confirm that they are now satisfied with the improvements made and of the regulatory status at Coombe House School. They have asked Ofsted to return to a typical inspection cycle.

8. Additional Commercial and Community Activities

Since the approval of the business plan in June 2023, the Company has made significant progress with the development of its 'non-School' commercial and community activities.

Short break provision (day)



During August 2023, its campus hosted two weeks of short break day provision for local children, including 28 children with additional needs who were eligible for funding from the Holiday activities and food programme (HAF) 2023.

Family Fun Day



The Company was also pleased to offer its campus for Dorset Council's 'Family Fun Day', which was very well attended. Meals were provided to those who were eligible for free school meals and a range of activities were provided. The Company was able to open its swimming pool to the families who attended, which was greatly enjoyed. Two members of the Dorset Centre of Excellence Board were in attendance to engage with families and young people about the work of the Company and its future intentions.

"I have a 10-year-old with ADHD and a 2 ½ year old on the pathway for autism assessment and they both loved the whole day thank you so much for all your hard work for all the children."

"All the time and effort involved to give families a free day out is very much appreciated. We loved being able to use the pool. It was our first time in this pool. Are there plans for local families to be able to use this lovely facility again in the future please?"

"I thought this was amazing, it's the first time my children have been able to have a bit more freedom to explore, it was safe and secure!"

Leisure

The efforts to offer the leisure facilities for local community use have moved on considerably. Following consultation with Shaftesbury Town Council and the Friends of Shaftesbury Swimming Club, a membership and booking portal has been developed by the Company to facilitate regular community swimming sessions outside of school hours. The portal provides paperless management of membership subscriptions and swim session bookings, with all payments made online.

The number of membership places has been incremented gradually since September 2023 and numbers currently stand at 70. Membership levels are currently capped until lifeguard availability allows us to offer additional swim sessions but recruitment to improve this is going well. In addition, a local primary school commenced hire of our pool facilities in September 2023 to deliver swimming lessons to their pupils, supporting local children and increasing the accessibility of the site.

Arrangements with a high-quality, local inclusive swimming lesson provider, who will hire our pool facilities at commercial rates, have been finalised. This arrangement will offer a range of benefits to local children and other community groups.



Plans are developing to further extend our efforts to ensure that the all-weather pitch and sports hall are also fully utilised.

Residential Social Care

The Company has made progress with its plans to register the proposed residential social care settings. The Managing Director has engaged with Ofsted to get preliminary feedback about the proposed operating model, with feedback being encouraging. There have been reciprocal visits with the Council's social care teams to ensure the opportunities to share best practice are maximised.



Through its development of its residential social care provision, the Company is having regard to the Council's Children, Young People and Families' Plan 2023 to 2033. In particular, the provision that is proposed will help to:

- “make sure that there are a range of short breaks available to support families with children with Special Educational Needs and Disabilities to be able to continue to care for their children.”
- “provide better value for the taxpayer as out of county placements can be more expensive and more difficult for (the Council) workforce to support.”
- “ensure (the Council) has a wide range of care options in place locally by ensuring (it) has the right number, type and quality of foster carers, residential homes and accommodation.”

Conferencing and Training

The Company has begun the development of its conferencing and training offer. It has hosted a conference for Dorset Council's Educational Psychologists and a group of local Youth Workers. In Autumn 2023, it has bookings to host a 'Children's Services Strategy Day' and is hosting a 'Mental Health First Aid' course. These activities are bringing in nominal commercial benefits so far, but it is anticipated that this will change as this arm of the Company's work grows.

Master Planning

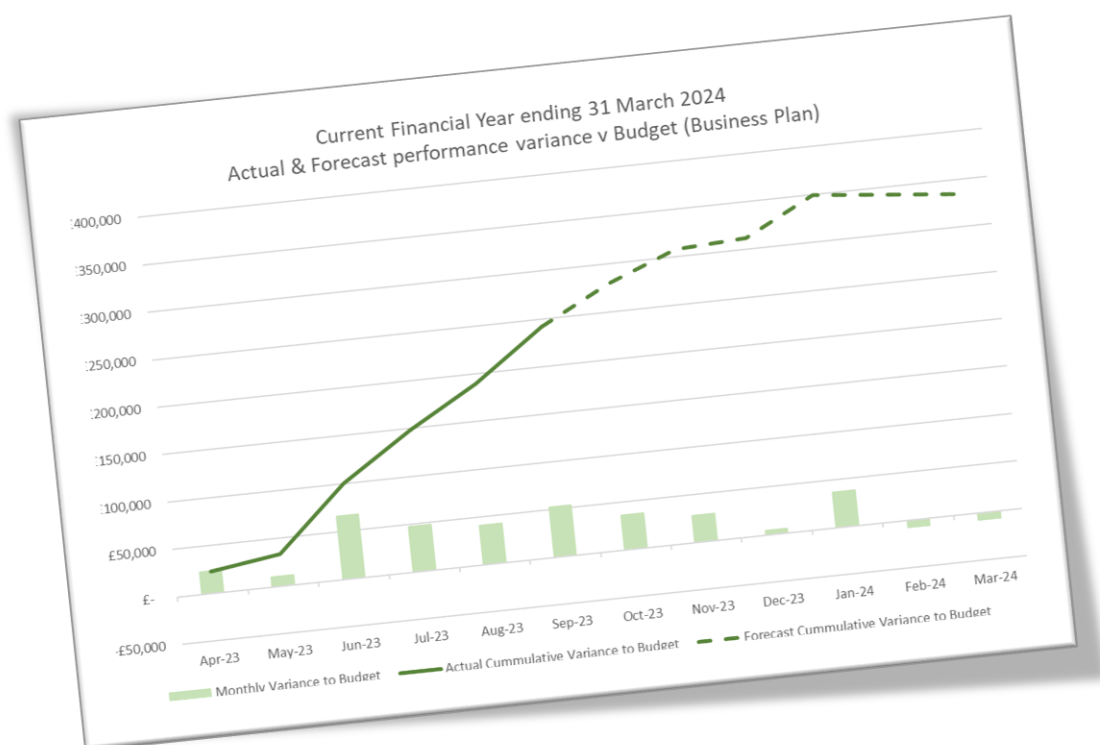
The Company is grateful for the Shareholder's commitment to fund a master planning exercise to fully explore the opportunities that exist. This exercise has not yet begun but the Company is liaising with the Council about the most effective way to do this.

9. Commercial / Financial Position

The Company has increasingly developed resilience in its financial management and governance thereof and through careful management has reached a place of significantly improved financial stability.

Year-end accounts have been filed with Companies House for the financial year 2021/22 and will be filed imminently for 2022/23. At the appropriate point, the Shareholder will receive detailed Unaudited Financial Statements for the year ending 2022/23 in line with the Companies Act 2006 and the relevant Financial Regulation Authority guidelines.

The financial year 2023/24 is proving to be a positive one. Through some overperformance on pupil roll and additional commercial and community activity the Company is performing ahead of the approved business plan. A drawdown from the working capital loan was required later than anticipated in the budget and at a lower than expected amount.



10. People

Following its initial period of operation, the Company faced many workforce challenges. Key themes were leadership capacity and continuity, staff retention, recruitment, and well-being. The Ofsted inspection in October 2022 showed that improvements were also urgently required to HR compliance and process.

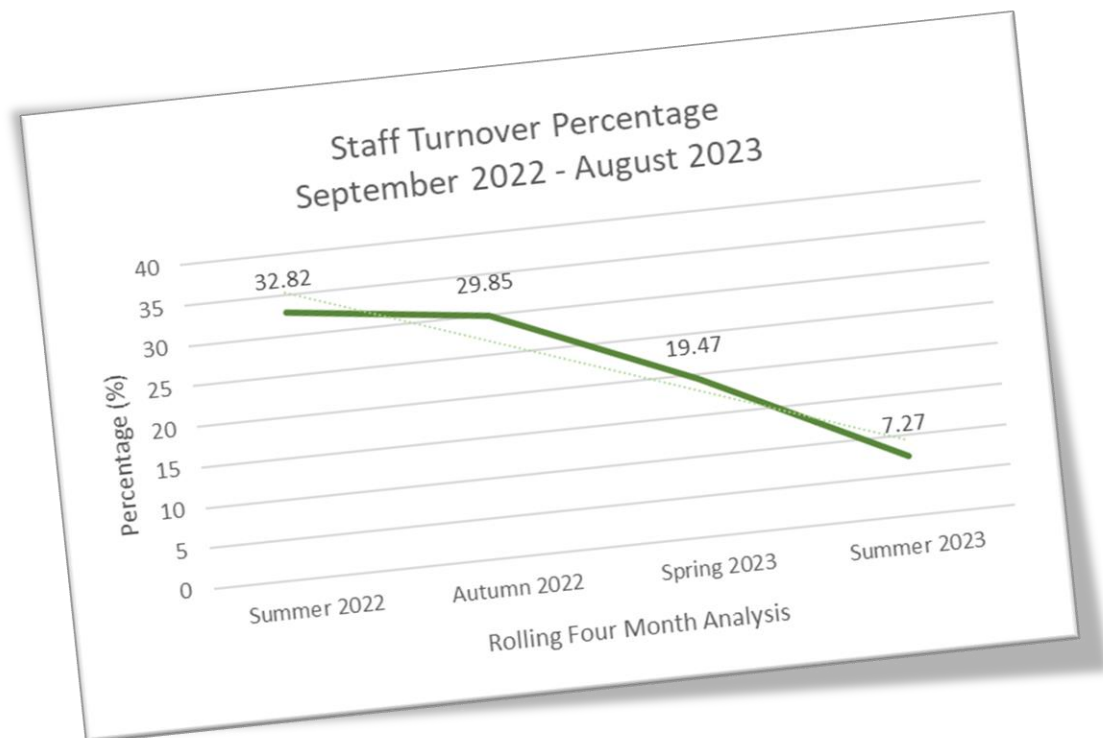
The new HR Manager, who took up their post in November 2022, has led a period of significant improvement by focussing on regulatory compliance, improving the clarity of expectations regarding the required level of skills and experience required to be appointed, improving induction and training provision, improving staff well-being and reducing employee retention. The change of approach has had a significant impact on the Company's ability to meet its growth intentions.

The Company continues to be aware of the challenges that exist within the recruitment landscape and through its ongoing development of its People Strategy, is creating an approach to counter

these. The recruitment challenges in the lead up to September 2024, and the recruitment challenges associated with launching our residential social care provision, shall be mitigated by the People Strategy.

The Company is now fully staffed in line with its business plan and is experiencing increasingly strong interest from a range of high-quality prospective candidates. Staff turnover has decreased dramatically and regular staff surveys enquiring about engagement and well-being show a steady and improving picture.

Staff turnover data demonstrates the overall improvements that have been made across the board. The chart below shows this reducing from 32.82% in to 7.27% over the course of the previous year.



11. Health and Safety / Facilities Management

The Company continues to work in close cooperation with the Council on the exact processes that will ensure the Dorset Centre of Excellence site is and will continue to be safe. This is working well but will be further strengthened through the amendments that are being finalised regarding the lease.

The Company would like to thank the Council for its extensive work to undertake full surveys of the campus during the summer of 2023, which has helped with long term planning.

The Company has developed robust processes for compliance and risk management. Due to the safe culture that has been developed, there have been no significant incidents or accidents in the last twelve months. Preventative and proactive measures, and a strong culture of training and awareness are in place.

During the recent Ofsted inspection report, commenting on their June 2023 visit, inspectors wrote that *'Risk assessments are now detailed, and updates are demarcated clearly. Leaders apply*

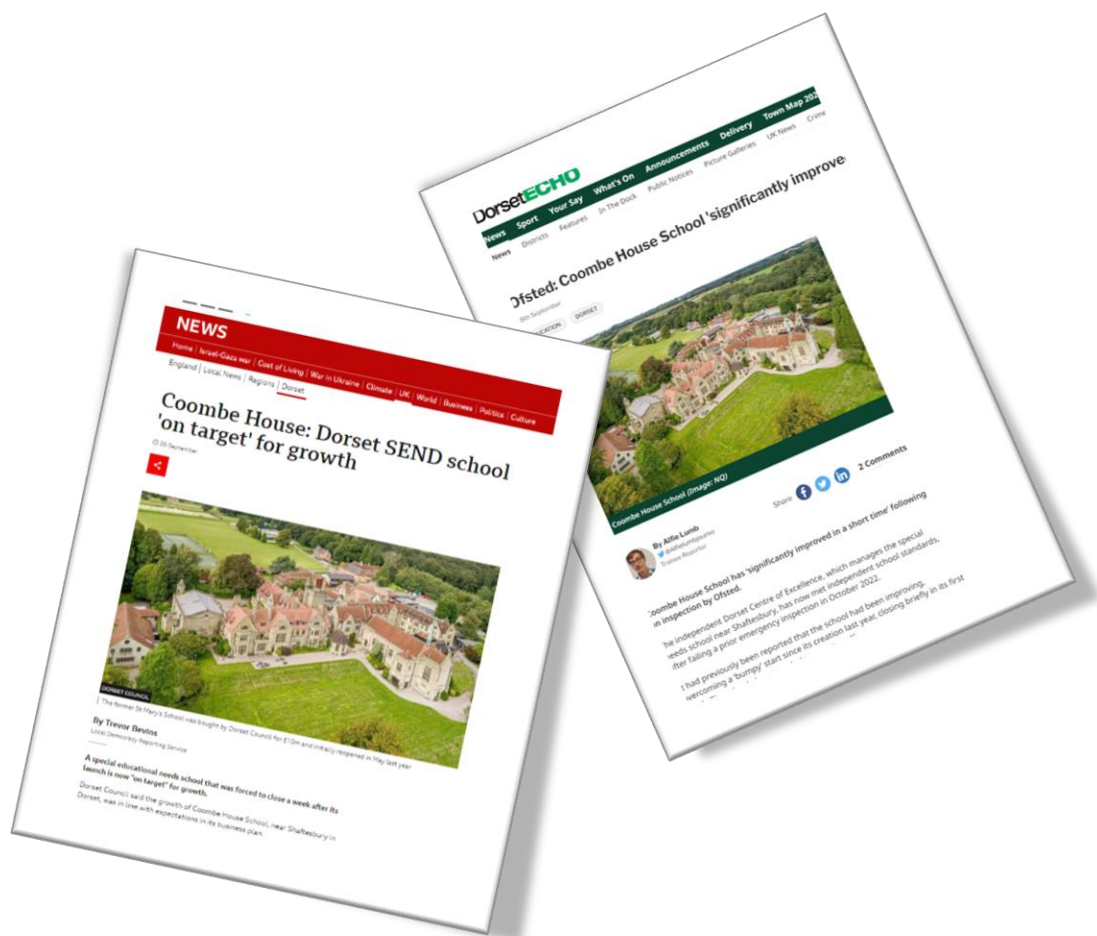
appropriate caution when taking pupils beyond the immediate school grounds. A comprehensive set of risk assessments covers the full range of school activities.'

12. Sustainability

The Company is proud of the sustainable credentials of the campus and has worked hard to ensure that the Biomass and solar facilities are working optimally to minimise its carbon footprint. Opportunities to further this are being explored.

13. PR / Reputation

The Company has been pleased to notice a gradual but notable improvement in the way its operations are being perceived by all stakeholders, including local residents, pupils, parents and families, professional partners and various media outlets. Some of the positive outcomes being achieved have more recently been reflected in some reasonably prominent news articles.



14. Appendix One – Biographies

DCE Board of Directors

Ian Comfort – Chair of the Board



Ian has a long and distinguished career in both educational leadership and management and work in the legal sphere. He is an experienced chair of a range of organisations including a further education college, a local authority trading company and Notting Hill Carnival. His experience in education is extensive, including being a teacher in a special school, a local authority director of education and group CEO of a large academy trust; he brings a wealth of knowledge and detail to his role as chair of the Dorset Centre of Excellence. Ian is a barrister and holds a range of legal and professional regulatory roles including being a Commissioner for the Criminal Cases Review Commission, an employment judge and judge of the first tier tribunal.

In his spare time he is chair of the Ebony Steel Band, an acclaimed and award winning steel band providing performances, workshops and classes, locally, nationally and internationally, awarded the Queens Award for Voluntary Service for its work with young people.

Anil Patil – Entrepreneur and former Barrister



Anil is a former barrister specialising in children act, family and matrimonial finance law. As an entrepreneur he was the worlds' first Starbucks franchisee, and now a principle shareholder of an organisation employing more than 1,500 team members across 92 sites. He currently volunteers as a mentor to looked after children; is an independent member of a fostering panel; NED of two health and social care CIC's; a governor of Walhampton school; and is a respite carer of a child in care. He is married, daddy to two boys and lives in the New Forest.

Dame Susan Jowett DBE - International education adviser, holistic leadership and lifestyle coach



Susan is a Trustee and lead practitioner for Trust Peer Reviews for Challenge Partners, a successful national network of schools and trust. Susan retired in 2017 as the CEO for Spencer Academies Trust, where she was a founding member.

Susan retains her passion for education and leadership and has provided leadership support for Schole's groups of schools in Uganda and Kenya. She has presented at national and international conferences. Susan's leadership and services to education were recognised in the Queens honour list, 2016. As a leader of Education, she has impacted widely on system leadership and school improvement. Her previous work as an Ofsted inspector has enhanced school to school support. Her public work was recognised by the Derbyshire – Nottinghamshire Chamber of Commerce in 2010 when she was a regional finalist for the Enterprising Woman of the Year award in 2011 for the Enterprising Team of the Year Award. She is also an active support of WomenEd and Woman in Leadership.

Diane Grannell – Retired Principal and Chief Executive



Diane recently retired following six years as Principal & Chief Executive of Bournemouth & Poole College, after a long career in further and higher education. She led her college to develop a curriculum that better met local skills needs and to improve the quality of student outcomes resulting in an Ofsted judgement of Good in all categories in January 2022.

A qualified Chartered Management Accountant, Diane has worked as the executive finance lead at a number of different institutions. In addition to financial expertise, she has extensive senior level leadership experience of education policy and regulation, institutional strategy, culture, organisational development and quality assurance. At one time or another, she has led most of the different professional services functions relevant to education institutions.

Diane holds a Masters Degree in Business Administration from Manchester University. She is married with one adult son and lives on the Dorset/Hampshire border. Having been involved in education for most of her working life, she is passionate about providing all young people with opportunities to fulfil their potential whatever their starting point and is a strong advocate for high quality education as a route to future individual success and wider economic prosperity. Diane has served as a Director of Dorset LEP and as Chair of their Finance, Audit & Risk Committee. She has recently been appointed as a Board Member at Falmouth University.

CLlr Frances Nicholson – Councillor and charity trustee



Frances was Lead Member for Children’s Services in Somerset for ten years up to May 2022, through a long period of improvement from inadequacy to a very solid Ofsted Good judgement this year. She is co-chair of governors of a federation of small rural schools, and is their SEND and Children Looked After governor. She represents Exmoor on Somerset County Council and is currently opposition spokesperson for Children and Families, as well as being a trustee for a number of local charities all with a purpose of enabling young people in the area to achieve their potential and be the best they can be, no matter what challenges they may face. She has had a varied career from making pottery through magazine publishing to software development and is passionate about valuing equally all the different skills, aptitudes and aspirations that young people may have and supporting them to reach their goals.

Hilary Morris – Commercial Director



Hilary has a wide range of commercial leadership experience through delivery of organisational change programmes and outsourcing/insourcing operating models in local authority as well as further education sectors. Hilary has a strong governance background having been secretary of a national association and board observer. In her substantive role as Commercial Director at the London Borough of Barking and Dagenham, Hilary has developed an effective company governance framework and overseen the creation and development of several independent boards across the portfolio.

Katie Kennedy - Educational leader in transformation and improvement



Katie has been working for over twenty years at the forefront of educational leadership. Initially at The Institute of Education, responsible for the engagement strategy of The London Leadership Strategy, part of the The London Challenge. Katie has taught in mainstream and the SEN sector, having been a leader in both primary and secondary schools, notably at Dame Alice Owen's School, named The Sunday Times Secondary School of the Decade, where she acquired more knowledge of teacher development through her postgraduate research in Teacher Development at The University of Cambridge. Following this and having been part of three Outstanding Ofsted inspections, Katie worked at County level as a School Improvement Lead. With a passion for helping more schools, Katie authored 'The Way to Outstanding' school improvement programme. Katie is focused on ensuring success for all students regardless of background or previous levels of performance. As a Company Director of Tutor Interact, she led the delivery of holistic tutoring programmes for hundreds of students to overcome barriers to learning with transformational results. Katie has also led and been part of new school bids for academy trusts and an international schools' group; understanding both the state and private sector.

Outside education Katie has been an ambassador for The Sick Children's Trust and on the Board of her local country parks charity providing accessible play equipment for all. Katie has fought for equality for children of all abilities throughout her career and brings this passion to her role at Coombe House.

Lesley Mellor – Chair and founder member of the Dorset Parent Council



Lesley set up the DPCC, a voluntary forum and registered charity, after moving to Dorset with her two sons who have special educational needs. Lesley is passionate about making positive changes for children and young people with disabilities in Dorset by giving a voice to families. She has worked closely with Dorset Council and the Dorset Clinical Commissioning Group to share the issues relating to the SEND community living in Dorset and to ensure the services meet the needs of disabled children and families locally. Lesley represents families and also facilitates networking of volunteers through participation events, steering groups/boards, working groups and co-production events.

Stuart Jones – Property and Development Consultant



Stuart is a Chartered Surveyor, who has specialised in all aspects of property development for over 30 years, with experience in both the residential and commercial property sectors. Stuart is a Fellow of the Royal Institution of Chartered Surveyors. He has also established a track record in dealing with property in the Education Sector, with a client base including schools, academy trusts and the HE/FE sector. In addition to his main job, Stuart has been a Governor of Bournemouth University since 2016.

DCE Executives

Andy Holder – Managing Director



Andy has worked in both the maintained and independent sectors for education and children's services and has a proven track record for opening and operating high quality special schools and children's homes for vulnerable children and young people. Having worked previously for a rural local authority in the southwest, where he had a focus on reducing the spend on 'out of county' independent special school places, and at director level within various independent provider groups, he has significant experience of leading growth for new services and in developing systems to ensure high quality and strong governance. A professional that is skilled and experienced in safeguarding, Andy fully understands the various expectations of the regulator.

Louise Hughes – Senior Finance Manager



Louise is a part-qualified Chartered Accountant, experienced in managing the financial performance of education-based companies, having previously overseen a thriving independent school in the southwest. Louise has been pivotal in improving the confidence in the Company’s financial reporting since she joined in December 2022 and has demonstrated an ability to communicate the priorities to various stakeholders in an accessible way. With a clear focus on careful cost control and financial governance, and strong skills in financial modelling, stakeholders can have confidence in the integrity of the financial information provided.

Mark Beckett – Facilities Manager



Mark has over 15 years of experience in the Facilities Management sector. He previously worked as an IT professional in the Financial Services Industry, specialising in the development and management of HR and Procurement systems. He has worked in both the private and public sectors including school settings and has extensive experience of facilities-based compliance and Health & Safety as well as planned and reactive maintenance, project management, energy efficiency and value for money.

Michelle Heywood – HR Manager



Michelle worked in the independent school sector for 8 years before joining the Dorset Centre of Excellence in November 2022 as the HR Manager where she leads on all aspects of the HR department. She has strong knowledge and understanding of KCSIE in the context of Safer Recruitment, and as an Associated Member of the CIPD she is a qualified HR professional with extensive experience and knowledge in employee relations and people management, combined with 25 years recruitment experience. She has previously run her own businesses in recruitment, resourcing and online advertising, and worked as a Project Manager for a suite of online jobs-boards.

Michelle is passionate about embedding the right staff to share the Company's values, ethos and strategic goals. She offers sound, practical advice and has a firm commitment to providing a positive experience for all our staff and prospective applicants.

School Leadership

Darren Harte - Headteacher



Darren has worked within the maintained and independent sector since qualifying in 2003. The majority of his career has been based within SEND taking up his first role within the sector in 2009. With a wealth of experience and knowledge of the sector he has been part of and led senior leadership teams through a number of Ofsted inspections with many of these resulting in outstanding judgements. Darren prides himself on building positive relationships with pupils ensuring that they are provided with the best possible opportunities and access to education.

Jemma Taylor – Deputy Head



Jemma has worked with the independent SEN sector since 2013, starting as a keyworker in an SEMH school in Blackburn where she then trained as a Teacher qualifying in 2016. After moving to Wiltshire, she worked at an SEN dyslexic school. Jemma quickly rose to head of department, Head of Year and finally Director of Studies. Jemma is from Northern Ireland, moving to England in 2009 to attend university. Creating an environment for young people where they can feel safe and happy is very important to Jemma and she is excited to support the growth and development of Coombe House School over the coming years.

Martin Marshall – Assistant Head



Martin has worked mainly within maintained schools since qualifying as a teacher in 1997. The first part of his career was based in a Middle School as a PE teacher and then he went on to progress through leadership, becoming a Headteacher in 2014. In more recent years he has been based within SEND, taking up his first role within the sector in 2017 leading a 'National SEND Award Winning Alternative Provision' for Most Innovative Provision. Despite the wealth of experience and knowledge he has gained in the past 26 years, he is always learning and continuing to enjoy the energy and challenge that the young people bring to school every day. Martin's most rewarding aspect of his job is the opportunity to enable young people to flourish, find something that inspires them and to see visible changes to their lives.

Outside of school Martin is married and a proud dad of four children.

Rebecca Smith – Assistant Head



Rebecca has over twenty years working in a variety of educational settings, including mainstream primary, special schools and a Category C prison. Writing as Rebecca Westcott she is the author of more than ten books, four of which were cowritten with an autistic teenager and are bestsellers. She is passionate about enabling young people to have their voices heard and this is central to her role at Coombe House School.