



SOUTH WESTMORLAND MULTI ACADEMY TRUST

REGISTER OF INTERESTS *(updated 16.04.26.)*

The Academy Trust Handbook requires Members, Trustees, Local Governors and the Accounting Officer to declare:-

- > Directorships, partnerships and employments with businesses
- > Trusteeships and governorships at other educational institutions and charities
- > Interests arising from close family relationships with other members, trustees or local governors
- > Interests arising from close family relationships with trust employees

This register is updated throughout the year and any changes must be notified to the MAT Governance Clerk, Sally Coyle

TERM OF OFFICE – Please note that all SWMAT Trustees have a standard term of office of 4 years at which point they must be re-elected or re-appointed as applicable. SWMAT Members do not have a set term of office

Name	Position held (inc. appointing body)	Date appointed & term of office end date	Relevant interests & date(s) began (date/s ceased also included where relevant)	Latest signed declaration
Sarah Swindley	Member (Member appointed)	15.12.22. -	<ul style="list-style-type: none">• Lake District Foundation (Charity) – Director (September 2017)• Spring North (Charity) – Trustee (July 2012)• Cumbria Local Enterprise Partnership (Economic Development) – Non-Exec Director (September 2019)• Nurture Tourism (Charity) – Director (September 2017)• University of Cumbria (Education) – Professor in Practice (June 2020)	29.09.25.
Miriam Bailey	Member (Member appointed)	16.07.25. –	<ul style="list-style-type: none">• Nil	29.09.25.

<p>Enid Fraser (Vice Chair of SWMAT Board)</p>	<p>Member/Trustee (Founding Member/Trust Board appointee)</p>	<p>30.06.15. – (Member)</p> <p>30.06.15. – 03.09.26. (Trustee)</p> <p><i>First appointed as Dallam School Governor 04.09.14. Re-appointed as Trustee 04.09.18. and 04.09.22.</i></p>	<ul style="list-style-type: none"> • Levens Good Neighbours (Charity) – Trustee (September 2021) 	<p>23.09.25.</p>
<p>Alan Gerrard (Chair of SWMAT Board)</p>	<p>Trustee (Member appointed)</p>	<p>20.10.20. – 19.10.28. (Trustee)</p> <p><i>Re-appointed as Trustee 20.10.24.</i></p>	<ul style="list-style-type: none"> • Lakeland Horticultural Society (Charity) – Chair of Trustees (August 2024) 	<p>23.09.25.</p>
<p>Pamela Houghton</p>	<p>Trustee (Member appointed)</p>	<p>02.07.20. – 01.07.28.</p> <p><i>Re-appointed as Trustee 02.07.24.</i></p>	<ul style="list-style-type: none"> • Parkhouse Country Estates Ltd/Parkhouse Lakeland LLP/ Parkhouse Lakeland Estates Ltd (Land Owners) – Director (September 1999/May 2003/September 2000) • Houghton Parkhouse Ltd (Manufacturing)– Director (September 1999) • Houghtons Home Improvement Centre (Retail) – Director (August 1990) • Gallery H, Arnside (Retail) – Partner (August 2002) 	<p>23.09.25.</p>
<p>Rupert Villiers-Smith</p>	<p>Trustee (Member appointed)</p>	<p>30.06.15. - 31.08.28.</p> <p><i>First appointed as Dallam School Foundation Governor 12.10.02. Re-appointed as Trustee 01.09.16., 01.09.20. and 01.09.24.</i></p>	<ul style="list-style-type: none"> • Dallam School Charitable Trust (Charity) – Ex-officio Trustee (January 2011) • Crossbarfx Limited (Banking) – Director and > 20% shareholding (July 2005) • Crossbar Limited (Banking) – Director and > 20% shareholding (October 2002) • Brig C E Tryon-Wilson Trust T/A Dallam Tower Estate (Private Trust) – Trustee (August 2006) • Newman Marriage Settlement (Private Trust) – Trustee (February 2006) • Charteris Will Trust (Private Trust) – Trustee (September 1996) 	<p>23.09.25.</p>

Claire Alexander	Trustee <i>(Member appointed)</i>	15.04.24. – 14.04.28.	<ul style="list-style-type: none"> • North West Leadership Academy (NHS) – Associate and Coach/Mentor <i>(September 2024/March 2024)</i> • MIAA (Audit, Assurance and Advisory Service)– Associate <i>(July 2024)</i> • IMAS (NHS Support) – Associate <i>(June 2024)</i> • Cumbria Health (Healthcare) - Non-Executive Director <i>(July 2024)</i> • St Mary’s Church, Kirkby Lonsdale (Church of England) – Independent Safeguarding Officer <i>(March 2024)</i> • Independent Leadership Consultant <i>(September 2024)</i> • Save the Children (Charity) – Volunteer <i>(September 2014)</i> • Good Governance Institute (Management Consultancy) – Associate/Specialist Advisor <i>(December 2024)</i> 	22.09.25.
Stephen Thomas	Trustee <i>(Member appointed)</i>	01.10.24. – 30.09.28.	<ul style="list-style-type: none"> • Refugee, Advocacy, Information and Support (RAIS) Lancaster (Charity) – Trustee <i>(January 2023)</i> • Lancashire Youth Challenge (Charity) – Chair of Trustees/Treasurer <i>(interest commenced in January 2023 and ceased in December 2024)</i> 	22.09.25.
Christopher Gates	Trustee <i>(Member appointed)</i>	23.09.25. – 22.09.29.	<ul style="list-style-type: none"> • Wright & Lord Solicitors (Legal) – Director and > 20% shareholding <i>(2010)</i> 	23.09.25.
Lucy Richardson	Trustee <i>(Parent elected)</i>	23.09.25. – 22.09.29.	<ul style="list-style-type: none"> • Lancashire Women’s Centre (Charity) – employed <i>(June 2023)</i> • Lancaster Girls’ Grammar School (Education) – employed <i>(September 2021)</i> • 24 Castle Park Management Company (Property Management) – Director <i>(August 2020)</i> 	23.09.25.
Joanne Wren	Trustee <i>(Member appointed)</i>	23.09.25. – 22.09.29.	<ul style="list-style-type: none"> • Ribblesdale High School (Education) – employed <i>(September 2005)</i> 	23.09.25.

Headteacher/Accounting Officer & Senior School Staff

Name	Position held	Date appointed and term of office	Relevant interests & date(s) began <i>(date/s ceased also included where relevant)</i>	Latest signed declaration
Steven Henneberry	Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) - employed • Dallam School Charitable Trust (Charity) – Ex-officio Trustee (10.02.23) • South Lakes Federation (Education) – Director (31.05.23.) 	September 2025
Chris Pattinson	Deputy Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed • PTI Education – employed (December 2018) 	23.09.25.
Joanne Hamer	Chief Finance Officer		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed • Kirkbie Kendal School (Education) – interest ceased May 2023 	02.09.25.
Darren Oliver	Senior Assistant Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed • Pearson/Edexcel Marking Team (Education) – employed (summer 2003) 	14.09.25.
Rob Surtees	Senior Assistant Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed 	02.09.25.
Rebecca Knipe	Assistant Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed • AQA Marking Team (Education) – employed (July 2016) 	07.09.25.
Samuel Watson	Assistant Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed 	04.09.25.
Kim Forsyth	Associate Assistant Headteacher		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed 	02.10.25.
Nicola Gilbert	Head of Boarding		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed 	24.09.25.
William Coxon	Accountant		<ul style="list-style-type: none"> • South Westmorland MAT (Education) – employed • Cumbria Education Trust (Education) – employed (02.02.25.) • Fells Trust (Education) – interest ceased 31.12.24. 	21.09.25.

Leavers – September 2023 onwards

Andrew Lauretani – Trustee <i>(Parent Elected)</i>	Elected 23.09.25.	Resigned 30.03.26.	<ul style="list-style-type: none"> • TUI Group (Travel industry) – employed <i>(1998)</i> • St Mary’s CE School, Kirkby Lonsdale (Education) – Foundation Governor <i>(March 2022)</i>
Roy Pirie – Member	Appointed 09.12.19.	Resigned 09.12.25.	<ul style="list-style-type: none"> • Dallam School Charitable Trust (Charity) – Trustee <i>(January 2011)</i>
Jayne Clarke OBE – Member	Appointed 13.12.18.	Resigned 31.07.25.	<ul style="list-style-type: none"> • The Pinnacle Learning Trust (Education) – CEO <i>(interest ceased upon retirement 31.08.25.)</i> • The Pinnacle Learning Trust (Education) - Trustee/Director <i>(interest ceased 18.03.25.)</i> • The Radclyffe Co-operative Learning Trust (Education) – Trustee/Director <i>(March 2011)</i> • The Sixth Form Colleges’ Association Ltd (Education) – Trustee/Director <i>(interest ceased upon resignation 31.08.25.)</i> • Dovestone Learning Partnership (Education) – Trustee <i>(interest ceased upon resignation 31.07.25.)</i> • Saddleworth School (Education) – Associate Governor <i>(April 2021)</i> • Clean Slate Commercial Cleaning Company (Commercial Cleaning) – Shareholder – 5% <i>(circa 2000)</i>
Becky Shanley – Dallam LAC Elected Teaching Staff Member	Elected 04.09.23.	Resigned 28.11.24.	<ul style="list-style-type: none"> • Dallam School - employed
Dr Andrew Knox MBE – Trustee <i>(Member appointed)</i>	Appointed 06.01.20.	Resigned 31.08.24.	<ul style="list-style-type: none"> • NHS - Ash Trees Surgery, Carnforth – Partner/GP <i>(April 2012)</i> • NHS Lancashire and South Cumbria – Associate Medical Director <i>(April 2022)</i> • NHS - Ashtrees Pharmacy, Carnforth – Director <i>(April 2019)</i> • The Well Charity – Chair/Non-Executive Director <i>(September 2018)</i> • Lancaster University – Honorary Senior Lecturer <i>(September 2018)</i> • King’s Fund – Associate in Population Health <i>(January 2019)</i> • NHS – Centre for Population Health – Associate <i>(September 2023)</i> • Icon – Trustee <i>(01.07.24.)</i> • Institute for Health Improvement – Faculty Member <i>(01.07.24.)</i>

Martin Shevill – Trustee <i>(Member appointed)</i>	Appointed 04.09.19.	Resigned 09.07.24.	<ul style="list-style-type: none"> • Wakefield Grammar School Foundation – <i>Chair of Governors (December 2023)</i> • Wakefield Grammar School Foundation – <i>Trustee and Chair of the Girls’ High School Education Committee (January 2022 – December 2023)</i> • MPS Education (Education Consultancy) - <i>>20% shareholding (January 2015)</i> • National Teacher Accreditation – <i>Senior Education Advisor (April 2016 – August 2024)</i>
Alison Coats – Dallam LAC Elected Support Staff Member	Elected 31.01.22.	Resigned 24.05.24.	<ul style="list-style-type: none"> • Dallam School - <i>Employed</i>