

REGISTER OF INTERESTS 2025-26

Name	Role/Appointed by	Name of organisation	Nature of interest	Date interest began	Date interest ceased	Notes
<p>Jacqueline Mallace</p> <p>Appointed by the Members 18/7/23</p>	<p>Initio Member</p>	<p>University Hospitals Dorset</p>	<p>Health Care employee</p>	<p>Oct 2020</p>		
		<p>Jacqueline Cotgrove Coaching & Consultancy</p>	<p>Workforce & coaching - sole proprietor</p>	<p>Oct 2020</p>		
		<p>Tricuro Limited</p>	<p>Care Provider - non-exec director</p>	<p>Oct 2023</p>		
		<p>Chartered Institute of Personnel & Development</p>	<p>Member of professional body</p>	<p>Aug 1988</p>		
<p>Heather Waldsax</p> <p>Representative of Corporate Member from 14/10/21</p>	<p>Initio Member – Salisbury Diocese Corporate Member representative</p>	<p>PCC of the Church of St Cuthburga Wimborne Minster</p>	<p>Trustee/Charity Trusteeship</p>	<p>Sept 2017</p>		
		<p>Song and Hymnwriters’ Foundation – Vice Chair</p>		<p>Nov 2016</p>	<p>June 2022</p>	
		<p>Bournemouth Symphony Chorus – Chair</p>		<p>July 2020</p>	<p>July 2024</p>	
		<p>Heather Waldsax - Consultant</p>	<p>Secondary Collective Worship Consultant - sole trader</p>	<p>July 2016</p>	<p>March 2023</p>	
<p>Charles Burgess</p> <p>Appointed by Salisbury Diocesan Board of Education on 30/01/24</p>	<p>Initio Member</p>	<p>Corfe Mullen Parish Church PCC</p>	<p>Trustee/Charity Trusteeship</p>	<p>July 2017</p>	<p>Nov 2025</p>	

John Kingston Appointed by the Members 26/01/26	Initio Member	-	-	-	-	
Jane Pavlou Appointed by Salisbury Diocesan Board of Education on 05/02/2026	Initio Member	Details to follow				
Geoff Bates 27/09/23 - 26/09/27	Initio Trustee (co-opted)	QE School (previously Allenbourn Middle)	Family connection - Pupils in a Trust school	October 2023		Former Local School Committee Chair – various Trust schools.
Alun Cooper 1/12/25 – 30/11/29	Initio Trustee (Member appointment)	The Friends of Elm Tree Inn First Federation MAT / Portesham Primary School	Director Hub Member - Governance role in other educational institution	November 2024 June 2024		
Debbie Fleming - Chair 28/11/22 - 27/11/26 (Foundation Trustee)	Specialist Advisor	Care Quality Commission		June 2022	Sept 2024	WAT Member until 15/12/22. Appointed Foundation Trustee 28/11/22. * Associated with former UHD CEO role
	Director	Exbourne Manor Freehold Limited	Property lease management	July 2023		
	Director	Bournemouth and Poole Healthcare Trust*	Health Care	Sept 2019	March 2024	
	Director	Private Health University Hospitals Dorset Limited*	Health Care	June 2019	March 2024	
	Trustee	The Brown Habgood Hall and Higden Charity	Charity	April 2023		

	Member of St John's Church, Wimborne			2005		
Noel Harrison 30/11/20 – 16/12/28 (Foundation Trustee)	Trustee/Director	Salisbury Diocese Board of Education	Charity Trusteeship	Nov 2018		
	Trustee/Director	SALED	Charity Trusteeship	Oct 2019		
	Chair of Governors	Beaucroft Foundation School	Governance role in other educational institution	June 2019		
Stuart Ingram 17/03/24 - 16/03/28 (Member appointment)	Employee	Ofsted	Inspector	2018		*Line manager of spouse of Initio Interim CEO
	Employee	United Learning	MAT Regional Director*	2015		
John Miller 4/06/24 - 3/06/28 (Foundation Trustee)	Employee	Canford Magna P.C.C. The Lantern Church - Operations and Projects Manager		October 2020	Sept 2024	
	Direct report at The Lantern Church	David Shanks (Skittles)	Skittles works as a Schools Chaplain at 4 of the Initio schools in Wimborne	April 2022		
	Owner and director	Nurtured Oaks Ltd	Consulting business	Jan 2019		
	Charity trusteeship	Canford Magna P.C.C. Trustee (Churchwarden)		April 2023	Sept 2024	
	Associate Consultant	S.A. Partners LLP	Complete consulting contracts at their clients.	Feb 2019		

<p>Peter Papworth 1/1/26 – 31/12/29 (Member appointment)</p>	<p>Employee/Director</p> <p>Chartered Institute of Public Finance and Accountancy</p> <p>Family connection</p>	<p>University Hospitals Dorset NHS Foundation Trust</p> <p>Membership of Professional Body</p> <p>Colehill First School / St Michael's Middle School</p>	<p>Chief Finance Officer</p> <p>Pupils in Trust schools</p>	<p>Oct 2020</p> <p>Jan 2007</p> <p>Jan 2026</p>		
<p>Richard Purchase 3/02/23 - 20/06/28 (Foundation Trustee*)</p> <p>*Member appointment 3/02/23 / Foundation appointment 21/06/24</p>	<p>Director / employee</p> <p>Governor</p> <p>Chair of Trustees until merger of Pre-School with St Georges Primary School</p> <p>Foundation Governor</p>	<p>Aliard Limited</p> <p>St George's CE VA Primary School, Langton Matravers, Dorset</p> <p>St Georges Pre-School Langton CIO - charitable trust</p> <p>St Nicholas & St Laurence CE VA Primary School, Weymouth</p>	<p>Strategic consulting service (pharmaceuticals)</p> <p>Governance role in other educational institution</p> <p>Governance role in other educational institution</p> <p>Governance role in other educational institution</p>	<p>April 2016/ Mar 2017</p> <p>July 2017</p> <p>July 2021#</p> <p>Sept 2023</p> <p>Feb 2020</p>	<p>Feb 2020</p> <p>Aug 2024</p> <p>Aug 2023</p>	<p>Foundation governor</p> <p>#LA Governor, then Foundation Governor after school joined Coastal Learning Partnership (CLP) on 1.9.23 (Chair of governors from 1.9.23). From 1.9.25, operating as a single LGB for St George's CE Primary and St Mark's CE Primary (Swanage) within CLP.</p>

Caroline Spearing (11/7/25 - 10/7/25)	Directorship	Haldon Property Management		Jan 2025		
	Treasurer	Society for Neo-Latin Studies		Nov 2022		
	Close family connections - spouse	Vice-Chair of Trustees, Authentic Education Governor, Dorset Studio School	Governance roles in other educational institutions	April 2024 April 2023		
	Chair of Governors	Sturminster Newton High School	Governance roles in other educational institutions	March 2024		
	Chair of Governors	Shaftesbury School		Sept 2025		
Brian Boyes (Interim CEO & Accounting Officer)	Spouse	Queen Elizabeth's School	Headteacher in Trust school	April 2019	August 2023	
	Vice-Chair / LA Governor	St Mary's CE VC First School, Charminster Glenmoor & Winton Academies (United Learning Trust)	Governance role in other educational institution Governance role in other educational institution	Nov 2019 September 2025	March 2024	
	Chair of governors					
	Parent	St Mary's CE VC First School, Charminster	Pupil in a Trust school	September 2021	August 2025	School joined the Trust 1 January 2025

Lee Miller (Interim CFO)	Employee	The Thinking Schools Academy Trust	MAT	Sept 2013	Interim appointment from 01/01/26 (contract in place between Initio Learning Trust and Thinking Solutions for Education)
	Director	Thinking Solutions for Education	Educational support services	July 2018	
	Trusteeship	Little Thinkers Nursery	Pre-primary education	June 2015	
	Member	Kenilworth Academy Trust	Governance role in other educational institution	Sept 2021	
	CEO	Ventures Trust	Governance role in other educational institution	Sept 24	
	Interim CFO	Arthur Terry Learning Partnership		Sept 26	
Sarah Stone (Interim Director of Finance)	Employee	Thinking Solutions for Education		Jan 2020	Interim appointment from 01/01/26 (contract in place between Initio Learning Trust and Thinking Solutions for Education)
	Employee	Interim School Business Manager for The Blandford School		Sept 2024	
	Employee	Finance Lead for Little Thinkers Pre-School and Nursery (subsidiary of Thinking Schools Academy Trust)		Sept 2024	

Past 12 months

Name	Position	Name of organisation	Nature of interest	Date interest registered	Date interest ceased	Notes
West Liz (CEO & Accounting Officer)	Spouse	Hillside First School	Teacher in Trust school – spouse	Sept 2019		WAT Trustee until 7/12/22
	Family connection	QE School	Family connection - Pupil in Trust school	Sept 2018	June 2021	
	Trustee	Queen Street Group	Educational support services	Nov 2025		
Clive Bath 1/02/23 - 31/01/27	Initio Trustee (Member appointment)	Minerva Learning Trust	Governance role in other educational institution - Trustee (Chair)	April 2016	January 2024	DOR 20/01/26
Emma Boger Appointed by the Members 14/11/22	Initio Member	QE School	Family connection - Pupils in Trust school	Sept 2018	July 2024	WAT Trustee until 28/09/22. Appointed as a Member 14/11/22.
		Care Quality Commission	Health care employee	Sept 2015	Sept 2023	
		Royal Mencap Society	Charity employee	Oct 2023	Dec 2025	
Patricia Mackenzie - 3/02/23 - 2/02/27 (Member appointment)	Director	Advanta Consulting Service Limited	Management consultancy	Feb 2023	Sept 2023	DOR 31/12/25
	Employee	Amtrust Management Services Limited	Insurance	October 2023	May 2024	
	Employee	Head of Risk at CNA Hardy	Insurance	June 2024		

Hilary Evans 1/8/17 - 31/7/25 (Member appointment)	Co-chair	National Network of Special Teaching Schools		2018	2021	DOR 31/07/25
	Sole Trader	Hilary Evans Consulting	Education Consultancy	2021		
	Advisory Committee Member	Tregonwell Academy	Governance role in other educational institution	2015	2023	
	Governor	Beacroft Foundation School	Governance role in other educational institution	March 2023		
David Lain (Director of Finance / CFO)	Chair of Governors	St Gregory's Catholic Secondary School, Tunbridge Wells Kent – Local Governance Committee	Governance roles in other educational institution	October 2018		DOR 31/12/25