

What questions should be considered when joining or forming a MAT?

Vision and Values

When considering questions around vision, values and culture, governors/trustees should be mindful there are no right or wrong answers, only answers that are right or wrong for their school.

Questions to consider:

- Do we share similar organisational values?
- What does the Trust want for the children and families in the community?
- Is this aligned with what we believe is right for our school community?
- How does the Trust engage the community with its vision and values? Is this genuine? Can the Trust provide any examples to demonstrate this?
- What are the Trust's current priorities? Are these priorities we can identify with?

Once this information has been obtained, governors/trustees should then consider the following:

- What is the Trust most proud of having achieved? Does this align with the value statements we have been given?
- What aspect is the Trust most looking to change? Again, does this align with the value statements provided?
- What is the one value the Trust would rather fold than compromise on?
- During a tour of the school does it capture the culture and value ethos?
- Is any school allowed to join the Trust? Or must they fit the culture, ethos etc.?

Due Diligence

The primary purpose of due diligence is to make sure that governors/trustees have obtained enough information about the school joining the Trust (or vice versa) before committing to going ahead. The second purpose is to negotiate a better position in respect of the terms of the transfer where any significant issues are identified.

Governors/trustees need to ensure they have an understanding of:

- the extent of any school improvement task and the impact on any other schools in the Trust
- the full extent of any liabilities transferring over
- the organisation purporting to transfer assets (including land) has the legal right to do so

- the actions and steps needed in the first 100 days post-completion to integrate the school into the Trust effectively

To obtain this information there are many areas of investigation to be considered in the due diligence process:

- Financial
- Organisational
- Performance
- Legal
- Commercial

It is important governors/trustees plan and scope out the appropriate level of due diligence they wish to undertake. There are many factors, which can impact upon this:

- Time – do you have enough time to complete the process?
- Attitude to risk – will you skew the process to focus on the higher risk areas?
- Resource – do you have the staff available and budget to complete the process?
- Legalities – do you have the documentation in place to rely on in the event of a future claim? Or do you need to invest in legal advice?

Funding and Growth

Questions to consider:

- Can the Trust sustain the academy schools it serves?
- What assurances can the Trust give as to its ongoing financial viability and probity? How reliable is the financial information provided? Are the assumptions used suitable?
- How does the Trust determine the funding allocation to individual academies? Will your school be better or worse off than at present? What services are you receiving for any “top-slice”?
- What is the procurement and purchasing strategy? Is the Trust benefitting from economies of scale?
- What is the reserves policy for the Trust?
- Is there a contingency for emergency spend?
- How is capital work funded?
- What is the growth plan?
- How is leadership grown within the Trust?

Once this information has been obtained, governors/trustees should then consider the following:

- What impact does this have on the autonomy in terms of budget setting and purchasing decisions?
- How much of the savings made from economies of scale is retained by the Trust and how do pupils benefit?

- Where does our school sit in terms of priority? Particularly on capital projects
- What are the mechanisms for talent spotting and succession?
- Is the growth plan sustainable?

Please note that the above list is not exhaustive and EES for Schools Governor Services are preparing a more detailed document for those schools that are considering forming or joining an existing Multi Academy Trust.