



**THE BUSINESS
OF EDUCATION**

Business Management Services
Business Management Professionals
Key considerations



Herts for Learning Ltd is a not for profit company owned by Hertfordshire schools and the local authority. Providing achievement and business services, it is dedicated to improving standards of education in Hertfordshire and beyond.

Key considerations for academy and MAT transition

The conversion of a School to an Academy, or the establishment of a MAT are complicated and often time-consuming processes. Taking the opportunity to understand the tasks that will need to be completed, as well as the new legislative requirements you will face, will ensure that your endeavour will be successful.

Herts for Learning have produced a range of Key Consideration guides, focusing on all aspects of the business of educational settings. These guides are a great starting point to begin to understand the transition process to becoming an academy or multi academy trust. They may also highlight any skills gap you may have within your setting, and the requirements of any assistance you may need.

To view the full range of Key Consideration guides, please visit

<http://www.hertsforlearning.co.uk/content/mats-preparing-for-change>

Planning and change management

Business Managers have a key role to play in project managing or facilitating the transfer.

- Develop a comprehensive project plan for conversion
- Consider the risks and how they can be managed and set up a risk register
- Be clear with school leaders how their accountability will change e.g. if the Head becomes the Accounting Officer and Chief Executive Officer
- If you are immersed in the project, keep in touch with your team managing the day to day workload

Communications and Marketing

Another key area for the Business Manager to take the lead:

- Plan to engage all key stakeholders
- Involve pupils in the changes and what it means for them
- Keep communicating with staff throughout the process to keep them informed
- Ensure parents are aware of the changes and can contribute and ask questions
- Liaise with governors to ensure they understand the changes for them if they are to become a Local Governing Body or part of the Trust Board
- Market the changes to the public through newsletters, website and social media

Staffing matters

SBMs can provide leadership of support staff through the change:

- Make sure you hold current detailed payroll and personnel information for staff who are to TUPE across
- Decide how centralised or not the support functions will be: lead functions with specific areas delegated to schools?
- Be flexible and innovative about new ways of working to increase the benefits to pupils
- Clarify the new roles of staff, their job descriptions and reporting structures
- Understand the management culture of the MAT and how the future performance management structure should operate
- Develop a clear set of policies and procedures that will work in the MAT context

Best value

Be clear about the new financial systems:

- Investigate and set up new banking arrangements and signatories
- Prepare SLAs with central support functions; charges should not be more than 7% max top slice of budget
- Prepare for EFA compliance with budget forecasts, revised schedule of delegation and new financial procedures
- Tender for audit services
- Develop new KPIs for the performance of schools in the MAT
- Ensure governor interests are recorded on the website and potential conflicts of interest identified to avoid related party transactions

Development Opportunities

Your practice will change; be open to new ways of working.

- It is likely your role will become more strategic, be ready to review your skills and identify gaps in your expertise
- Be prepared for greater financial accountability, transparency and record keeping
- Decide how will you work with other business managers, the Trust Business Manager or Chief Financial Officer
- Do you need to increase your team to deal with the new accountabilities
- Take the opportunity for shared INSETs and shadowing across the MAT
- This could be a good career development opportunity for you and your team

Contact us

For further information on the support available, and to view all Herts for Learning MAT services, please visit <http://www.hertsforlearning.co.uk/mats>, email business.matters@hertsforlearning.co.uk or call 01438 845111.