



**THE BUSINESS  
OF EDUCATION**

# **Business Management Services**

## **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>

# Use a proven project format

An academy conversion or a MAT establishment are projects unlike any that will be taking place in schools on a day-to-day basis.

The need for a clear roadmap to help you navigate this journey will be essential to arriving at your exciting destination.

There are many Project Management techniques that can be employed to assist, but a robust development plan should consider:

- All tasks and activities
- All interactivities which may affect timeframes
- Consideration for communication points and required consultations
- Resources required for each task
- Responsibility allocations
- Reporting methods
- Procurement requirements and processes etc.

# Consult where needed

The development of a MAT and the conversion of a school impacts on a great number of people and interested groups.

Within the DfE's guidance, there is clear requirement for structured and recorded consultation, although the delivery requirement of this is less clear.

The guidance does highlight the need for such consultation to extend beyond the standard governance structure of the school to include parties not always included in general decision making, but it is key that this is completed ahead of the appropriate milestones.

These consultations should include consideration of the following:

- Format and structure of the meetings to ensure compliance of the process
- How such consultations should be advertised
- How feedback will be captured and how will it be considered
- Who should be considered as essential attendees at each meeting
- How many meetings should be complete at each appropriate point

# Seek assistance where needed

The conversion process establishes an organisation with new responsibilities. These range from the compliance with varying legislative requirements to new auditing and reporting processes.

In many environments, these new challenges will require the upskilling of appropriate team members, and can also highlight the need for professional advice.

This is important to ensure that the appropriate protection is in place moving forward and these professional advisory services can include:

- Legal Services
- Project Management Services
- Financial services
- Actuaries
- Marketing Services
- Technology Providers

# Unrestricted and restricted balances

As you set up your MAT, you will need to have a clear policy in place detailing how you will treat each academy's unrestricted balances and any restricted carried forward balances going forward.

A MAT is allowed to pool these balances and can make decisions on how these can be used across the estate of the MAT.

Always be aware that if an academy decides to leave your MAT in the future, they are entitled to take what remains of their unrestricted balance with them. Therefore clear accounting of such funds from the beginning must be in place.

# Keep everyone informed

Every period of change and reorganisation can be one of great anxiety and concern for those who will be impacted by the outcome.

It is important during these projects to keep the appropriate parties informed of the progress, issues and successes in order for them to feel supported and encouraged.

A communication Strategy is useful and could consider the following:

- Stakeholders and Interested Parties
- Communication methods and avenues
- Pitch and content of communications
- Understating levels and explanatory requirements
- Consultation and meetings calendar
- Differentials between internal and external communication requirements

Never underestimate the importance of clear communication and frequent updates to stakeholders



# 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](mailto:business.matters@hertsforlearning.co.uk) or call 01438 845111.