



Motto: Flying the banner of love, wisdom and excellence.
Scripture 'His banner over us is love.' Song of Solomon 2:4.
Values Our three core values are love, respect and friendship



It is with delight that we welcome your interest in joining the Staffordshire Schools Multi Academy Trust (TSSMAT). We hope that this document, in conjunction with discussions with us, support your important decision. We recognise that it is imperative to decide on the right MAT to join, one that is compatible with your school vision and ethos and which will enable it to thrive. We won't offer a hard sell and hope that the attraction of a family approach, ethical leadership, a collaboration of expertise and support draws you to our Trust and that TSSMAT is your Trust of choice.

We are at an exciting time as a small and steadily growing MAT. We believe new schools will relish in the strength of our Trust whilst being part of its exciting growth journey, one which will have an efficient and effective number of schools so we all can further benefit from economies of scale, shared good practice and resources.

Being a member of TSSMAT means that you believe in people, valuing and retaining excellent staff through a focus on wellbeing, collaboration, sharing of expertise and CPD. You believe in driving standards and providing rich opportunities for our children and families. Working in partnership allows us to support, challenge and shape each academy within the community it serves. We ensure that heritage and traditions remain part of school life, harmony through collaboration is sought and ensure that supported autonomy is our approach. Our schools work closely together to ensure we are at the forefront of research and expectations to deliver an effective, bespoke, broad curriculum securing excellent academic, social and emotional outcomes for all of our children.

We have a highly dedicated team of experienced staff who are here to provide help, advice and support to interested schools and their Governors. The first point of contact for any queries related to joining our Trust is: Mrs Charlene Gethin CEO 01543 472245 ceo@tssmat.staffs.sch.uk

Staffordshire Schools Multi Academy Trust





Who are we?

Our Trust was established in 2015 to support small schools working in rural communities to provide the very best education possible for their communities. We extended our scope in 2019 and became the newly branded Staffordshire Schools Multi Academy Trust with a growth plan to work with a range of schools from different phases who share our ethos, vision and values which encompass ethical leadership principles, opportunities for all and who put children at the centre of all they do.

We are based north of Lichfield and at present, there are four schools within the Trust, three are Church of England Schools and the fourth is a Community School. The Schools are located in the Villages of Colton, Elford, Kings Bromley and Great Haywood.

Schools currently in the Staffordshire Schools Multi Academy Trust:

The Richard Crosse CE Primary School	Kings Bromley
St Mary's CE Primary School	Colton, Rugeley
The Howard Primary School	Elford, Tamworth
Anson CE Primary School	Great Haywood

The Staffordshire Schools Multi Academy Trust is governed by a group of dedicated professionals who first and foremost care about children and young adults and the staff they serve.



Staffordshire Schools Multi Academy Trust



Mission

To ensure that all children and staff are enabled to flourish as confident, happy and healthy citizens. We encourage our children and staff to grow and achieve academically, socially, spiritually, culturally, physically and mentally in our aspirational and nurturing schools.

Vision



Who are we? Educating for personal development

- We are a Trust family of collaborative, innovative schools committed to excellence for our children, staff and the communities they serve.
- Our Trust community is built on the basic principle of respect, valuing the preciousness and inherent worth of each person.
- We develop a united partnership where empowered leaders place our staff and children's wellbeing and achievement at the centre of everything and are supported to be successful.
- We employ and develop excellent professionals who have passion and drive, a desire to learn and grow and work in a context of effective support and challenge.
- We nurture a culture of physical and mental health and wellbeing, listening to feedback to enable a state of openness and contentment.
- We foster and nurture the children's understanding of their own identity, and ensure we harness and develop an understanding of positive self-worth and esteem amongst our staff and children so that they know their strengths and have the knowledge, skills and confidence to take their next steps in their learning and careers.
- We offer an inclusive, compassionate and supportive ethos where we celebrate the diversity and uniqueness of every individual and ensure that all may flourish and have an abundant life.
- We have the highest expectations of behaviour where children learn choices in a supportive and safe environment and staff and children cope wisely when things go wrong through conflict resolution, forgiveness, love and reconciliation.



How do we learn? Educating for wisdom, knowledge and skills

- We maintain the highest expectations of achievement crafting bespoke, broad, balanced, vibrant curriculums ensuring deep learning which are unique to each school community.
- We ensure our schools are learning communities where everyone is valued as an individual and where children and staff are enabled to achieve their very best.
- We enable confidence and delight in seeking wisdom and knowledge and develop passions and talents in all areas of life.
- We engender a love for education so that children enjoy attending school and are engaged in their learning.
- We aim to achieve excellence for all children so that they make good progress and are able to make informed choices, solve problems and make good decisions.
- We ensure that all children succeed and thrive by raising aspirations and tackling disadvantage.
- We recognise the importance of measured outcomes and achieve this through academic studies and enrichment of children's lives with experiences and values which enhance and prepare them for their futures.
- We develop positive working and learning attitudes built on a metacognitive approach inspiring in our staff and children the notion that we are lifelong learners who take pride in and celebrate their achievements taking ownership of their learning and careers.



How do we live? Educating for community and living well together

- We have a collaborative approach which maximises the potential of our Trust to develop all our staff and children through on-going learning and our belief that our children deserve the very best each and every day. Our shared focus improves education and raises achievement across all schools to the highest standards.
- We ensure our children will thrive and achieve as confident and caring people developing good citizenship in our local, national and global communities, valuing and respecting human dignity, diversity, engendering tolerance and challenging social injustice.
- We recruit and retain exceptional staff, offering collegiate, evidence based provision which has a significantly positive impact on children's learning and we deploy and retain staff through Trust level opportunities, shared practice and the opportunity for flexible working.
- We engender collegiality with a core focus on relationships, listening to, sharing with and learning from each other. We nurture and empower teams which enhances expertise, shares best practice and enables the professional courage to explore possibilities.
- We enable families to embrace opportunities across the Trust, helping to promote the best outcomes for all children.
- We ensure that local communities have a future and can thrive with quality education at their heart.
- We secure school environments and premises which are safe and well-maintained with facilities that are constantly improving.
- We have shared infrastructure, operational systems and business platforms which makes the best use of resources and benefits from economies of scale.
- We plan for sustainability and cultivate an awareness of environmental and global issues to secure the future of our world.
- We work together for the collective good of the Trust in the context of what is best for all.

Each school in our Academy Trust has its own identity and unique culture but shares the overall ethos and vision of ensuring our children and staff flourish and achieve.

Our **approach to teaching and learning** is to apply a consistency of pedagogy across the Trust which ensures that all pupils achieve, feel secure enough to take risks and make mistakes, have high aspirations for learning and for the next phase of their education. We engender children to develop self-motivation, have high self-expectations, promote independence, resilience, respect, tolerance, an open-minded world view. We aim to inspire staff and children to take pride in our Trust and community and know how they can successfully contribute to this. We prioritise early identification of need which leads to bespoke challenge and opportunity to harness gifts and talents and, provide intervention which supports and challenges children to access all of the curriculum and receive the support they need to achieve.



Our Trust has a range of approaches to **the curriculum** and good and outstanding schools can retain their own curriculum although there are some key expectations which we would ensure schools adhere to. Currently, three of our schools have the same, Trust developed curriculum working in collaboration with each other; and the fourth school retains its curriculum but with significant



common approaches, structures and links. We recognise there are nuances based on school structures.

Our curriculum expectations are that it:

- Is inspiring, broad, balanced and rigorous.
- Engenders children to enjoy their learning and want to come to school to learn because it is meaningful and exciting.
- Is planned in coherent and intelligently sequenced schemas.
- Is clear on what we intend pupils to learn, set out by subject

specialists using the National Curriculum, current research and local contexts.

- Ensures that careful consideration is considered as to how we will implement the curriculum with effective staffing and high quality resources for staff at all levels to use to deliver the curriculum.
- Is grounded in research and evidence about how children learn and retain knowledge focusing in particular on research from cognitive science.
- Includes educational visits and visitors and innovative ways of delivering the curriculum to enrich children's educational experience on a regular basis.
- Engages in events and competitions such as sporting, musical, artistic, scientific opportunities etc.
- Is assessed well - teachers know how children are achieving and assessment for ongoing learning is utilised effectively to support children's progress.
- Assesses, at key points, standardised and national tests which support a clear understanding of standards – attainment and progress.
- Ensures learning is real, purposeful, exciting and relates to the world the children live in and will contribute to as they grow up.
- Considers the skills children need and develops independence and collaborative learning skills, skills for learning, skills for life.
- Is recognised throughout our learning environment which is organised, tidy, purposeful and which is used for continued learning opportunities.
- Is involved in community - community is part of the life of our schools and the children impact on the life of the community.
- Ensures learning environments are organised, tidy and will enhance the learning and curriculum opportunities that are provided.
- Utilises specialist teaching ensuring all children have an opportunity to learn PE, modern foreign languages and musical development well.
- Recognises equal opportunities inspiring all children to succeed.
- Is continually reviewed and monitored with clear evaluation and feedback for next steps of development ensuring we know our position and strive to provide and maintain outstanding provision.



TSSMAT Key Performance indicators

- All our schools will be good or better at their first Ofsted inspection following conversion.
- Attainment and/or progress will be at least in line with national measures (and where there are exceptions due to the small number of pupils with high % points, case studies are clear).
- Attendance will be at least in line with national figures and
- All schools will have appropriately trained staff as per the Trust CPD guarantee.
- There are opportunities for key staff to work across the Trust schools to support school improvement.
- All schools are well supported by strong governance supported by the Trust Board.



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- Pupils have opportunities to work together across the Trust.
- All schools have a balanced budget and roll forward a small surplus at the end of each year.
- The Trust remains financially stable.



Who can apply to join our Trust?

Any school that shares our vision

- Any school that wants to have greater autonomy whilst also benefitting from membership of a strong and secure group of academies who support each other for the common good of their children
- Any school that wants to be part of a family of schools whereby actively shared best practice and continuing professional development helps all of our staff, pupils and Directors to flourish.



Accountability

As a charity and company limited by guarantee, the Trust is governed by a board of Directors, (the Board) who have overall responsibility and ultimate decision making authority for all the work of the Trust, including the establishing and running of the academies maintained by the Trust. Our schools are accountable to our Trust Members and Board of Directors.

All of our schools have a Local Governing Committee who report to the Board. All newly joining schools retain a Governing Board who report to the Trust Board, which has delegated a certain proportion of its powers and functions. The Terms of Reference set out the constitution, membership and proceedings of the committees the Board has established. All new schools will undertake a review of governance to establish the successes and challenges of the board. Additionally, the parent and community voice is heard through a range of mechanisms and all our schools have an effective Parent Forum.

We have 5 members and 8 directors plus the CEO. Please see the end of the document for our Key Personnel details.

- Chair of Directors and Director of Performance and Quality
- Vice Chair of Directors and Director for Strategy.
- Director of Finance and Trading
- Director of Local Advisory Groups
- Director of Corporate Affairs – Human Resources
- Director of Corporate Affairs - Estates, Learning
- Director of Environment and Health and Safety
- Director of Pupil Care

The Terms of Reference for each committee contain details of the functional responsibilities delegated to them by The Board. The desired outcomes for each committee is to:

- Enable the Directors to deliver their responsibilities in the most efficient, effective and innovative way possible
- Ensure there is a good level of information and knowledge sharing between Directors
- Create a committed and inclusive team
- Allow us collectively to understand what each Director is doing to help facilitate the delivery of our vision.





We want all of our schools to feel the benefits of autonomy. An autonomous school is a school that takes responsibility for itself. Taking responsibility and accepting accountability are key components of success in schools. We will work as a true partner to ensure the ongoing success of all our schools.

Why join TSSMAT, what are the benefits?

Local authorities have a diminishing role with vast cuts in the services they provide. This is against a backdrop where the government strongly encourages (Whitepaper 2022) schools to join and grow MATs and their requirement for all schools to become academies. Our current position and growth trajectory offers a structure of support and challenge which respects each school's unique community, heritage, strengths and indeed needs for support where necessary and in a range of areas.

When joining the Staffordshire Schools Multi Academy Trust, you join a team and become part of a group of passionate individuals with a range of expertise to celebrate all of our school's successes, to be supported by and to support and impact on a wider range of schools, professionals and impact on a wider group of children's life chances.

Joining TSSMAT will ensure proven good and outstanding schools retain their autonomy within a framework set by the Directors, and, where schools need support to raise standards, significant support and a collegiate approach will be undertaken but, some prescription of Trust practices may be necessary to engender self-supporting excellence. No individual character, tradition and heritage will be lost in this process – schools will not become clones of the Trust, simply better versions of themselves. Support and guidance will be given to enable a complete focus on key drivers for improvement, and clear and simple accountability structures will be in place.



Our experience of school improvement through collaborative and joint leadership goes back to federated governance in 2007 in two of the schools. Collaboration makes us strong. We employ specialist leaders and teachers who work at all schools within the Trust. Through the support of the CEO and the Finance and Business Operations Managers, our Executive Headteachers, Headteachers and Leaders of Learning (champions) are able to concentrate on the core functions of Teaching and Learning and all matters relating to our children including physical, social, emotional and cultural development.

We believe that the best way to improve outcomes for children is by the sharing of expertise through peer-to-peer and school to school support. Continued professional development is key; staff are supported and given opportunity to develop their skills. Staff are encouraged to develop their leadership skills by leading subjects across the Trust. As a Trust, we want to get away from the 'Jack of all trades and master of none' approach, which is so common in small schools, due to the small number of employees having to be responsible for numerous curricular and other areas of the school's business. We employ the services of trained leaders to help develop our middle and senior leaders. Schools have the opportunity to take part in peer-to-peer review to ensure rigorous

monitoring and school improvement. Our Headteachers and Chief Executive Officer undertake this, and any school joining us would be expected to take part.

To ensure improvements and collegiate working, feedback will always be honest, concise and transparent.

What we offer



- Good leadership at all levels and strengthened leadership across our Trust.
- Combining the knowledge, experience and skills of multiple school leaders at all levels we can strengthen the leadership of the schools in the Trust.
- A network of support. With good, shared leadership comes the opportunity to network and collaborate at all levels sharing research and good practice.
- Regular updates on emerging practice and research.
- Schools have less bureaucracy due to centralised



functions such as HR and finance, health and safety and estates and, as result, have more freedom to innovate; in turn raising standards in everything they do.

- Role and responsibility management in order to alleviate Headteachers from school business functions and to focus on the bits that really matter - teaching and learning, staff support and training.

- High achieving and attaining schools and, where schools join in difficult circumstances or falling standards, clear, developed support and guidance ensuring rapid change.

- Sharing staff: this can help combat the recruitment challenges currently facing schools and offer staff more varied opportunities and career progression.

- Specialist people and resources: the combined funding can allow specialist people and resources to be bought in many different areas to improve them – such as extra-curricular activities and operational functions.

- Upskilling: professional development can be sourced without in-house professionals, cascaded provision and improved through training as the cost per school will be spread, allowing for more training sessions and the upskilling of individuals to be increased.

- Accountability is shared: because a Trust is representing more than one school it is in their interest to bring all schools up to the standard of the best and to continue to raise standards as expectations rise.

- Economies of scale: as a Trust can purchase as a whole, the economies of scale work in favour, allowing for savings to be made which wouldn't be possible as a single school.

- We can bring effective technology to schools which would be incredibly hard to achieve as an individual school due to budget constraints.



Throughout the year schools in the MAT will benefit from:

- CEO, SLT, and Curriculum Leader / champion support from across the Trust and National Forest Teaching School.
- Access to a full programme of CPD support for teachers, teaching assistants and admin teams.
- Financial planning and budgeting support.
- Buildings and site development and improvement.
- HR support.
- Access to the ECT induction and CPD programme.

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- Access to moderations programmes: EYFS, Y2 and Y6.
- A suite of Trust central policies.
- Safeguarding and compliance audits/ongoing support with any identified actions.
- Health & Safety review.
- Peer to peer reviews.
- Pupil premium reviews.
- Consistent appraisal.



Academies joining the Trust agree to:

- Adopt the ethos and values of the Trust, put children, school improvement and enhanced curriculums at the heart of their work.
- Work within the framework of the Trust.
- Adhere to TSSMAT financial management and statutory HR policies and procedures.
- Adhere to the Central Trust policies and bespoke statutory policies relevant to school life as guided by the DFE and the Trust.
- Implement TSSMAT governance structure.
- Share expertise and joint staff professional development.

- Ensure Wellbeing for all is a high priority, is reviewed and plans for improvement are reviewed.
- Embrace the capacity to grow and develop our staff.

Our Trust aims for *all* schools in our partnership to be good or better. We want to ensure that no child, no teacher and no school gets left behind. We feel that as an Academy Trust we are able to work more creatively to best serve the needs of our children and our communities. We are able to plan for the long term development and use our staff as well as a more flexible and responsive approach – we share our expertise and grow our own teachers and leaders. We ensure that our staff have opportunities to grow within and across our Trust, ensuring that we retain our high levels of expertise and ensuring that our succession planning is secure.

The communities that we serve across the Trust encompass stakeholders from a range of demographics and our ethos is one of inclusivity, promoting an equality of opportunity for every child across the Trust.



We maximise the freedoms afforded to us by academisation through reinvesting any financial surplus to create additional benefits and opportunities for our children, developing leadership capacity and specific expertise, staff retention, new ideas for schemes of work, challenge within school variation, having a more systematic and cost effective sharing of professional development, sharing of resources to improve financial efficiencies and creating strength through alliance.



The Trust sets out a calendar for training and school improvement each academic year:

- All good and outstanding schools receive a SIP visit from the CEO half termly, with an agreed agenda. Outcomes of these visits will be shared with the Board of Directors.
- Peer to Peer reviews will be undertaken to celebrate and support development and maintenance of standards on a termly basis.

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- All special measures or requires improvement schools receive regular support improvement visits with the CEO, Strategic curriculum leads, curriculum champion and subject leaders as well as the Chair of Directors.
- Appraisal policy and procedures are consistent and all schools will use the Perspective system to record appraisal objectives for teachers and support staff.
- Lead staff in each school will be expected to work with staff in the other schools to develop consistent policy and procedures across the MAT - e.g. SEND policy, Child Protection, Assessment, Attendance.
- Key staff meetings and INSET days are identified for MAT collaboration and development.
- Common areas for training and development are identified for the academic year.
- There is a 2 year ECT programme in place for all ECTs across the MAT, led by senior leaders from across the Trust and supported by key staff from all schools.
- There is a moderation programme in place for key year groups across the MAT, led by the CEO and supported by SLT and key staff from all schools. This will take place every half term for EYFS, KS1 and KS2 and, in the future, every term for Y1, Y3, Y4 and Y5.
- There is a common policy and procedure for assessment across the MAT. Assessment information is collected every half term and progress evaluated and shared.
- Each Headteacher will participate in annual peer to peer reviews with their Headteacher colleagues.
- There will be an annual safeguarding audit, website/policy compliance review and governance review.



How is school improvement reported to the Trust Board and how is it challenged?

- The Trust has adopted a common format for the Headteachers' termly school report, which ensures consistency for comparisons and an accurate representation of the schools' current performance. The Trust measures KPIs for attendance, admissions, standards, and the quality of teaching and learning.
- This is reported termly by the Headteachers directly to the Trust Board. It is challenged within the meeting by the relevant Directors. Reports are then sent to Members and are challenged and commented upon at their termly meetings.
- The CEO meets with the Headteachers on a weekly basis and many aspects of school improvement form part of the agenda and this is reported to the board.

Central Team Services and Trust Finances

Supporting our schools in their day to day management and administration is key to ensuring that children and staff perform at their best. Leaders are free to lead teaching and the Central Team supports schools to run an efficient operation. Our Central Team has expertise in finance, HR, governance, premises, ICT and school business administration.



Schools will not be charged with a one size fits all top slice but instead will be charged proportionally to the school's level of need and size. This charge would include a general contribution to allow TSSMAT to operate and would be calculated as a cost per pupil so a smaller school pays less. The charge would be within the range of 5% - 7% of annual GAG and we would hope that most schools would see a net financial gain with this arrangement. We expect to build the financial model together with our future partners and, as we

grow, will offset the costs to schools through economies of scale and increased central services so changes in approach may take place over an extended period.

The following outlines the systems/tools and contracts our schools joining the trust will need to have and where autonomy is maintained, Additionally, this outlines what the Trust pays for and what the school pays for - which will be commensurate with current contracts schools need to have and schools should see little difference and potentially some gains.

As we grow our centralised offer will develop and further savings will be passed onto schools.

In order to secure best value for money, as we come to the end of our contracts we review the market for other tools and providers and ensure best practice.



*The Trust can support the school with the choices they have, provide quotes and broker a good contract due to larger buying power should they choose to do so but the autonomy is held by the school.

** In exceptional circumstances, by consultation, secure schools may be able to keep their own systems with relevant Trust access.

Provision (op denotes that this is optional)	Details	Additional notes
Finance	Schools will need to transfer to our system Xero Annual financial audit Accountants School will need to transfer to our budget planning software - this is currently provided by Orovia Education	Transfer costs are taken from the grant to academies – this happens on the day of transfer. Training in the use of this system will be provided Continuing costs are borne by the school – Xero, our financial package includes an annual budget planning solution, financial audit, pension evaluations, and access to our accountants
Cashless school system	We expect our schools to have a cashless system. We use Parent Pay in our current schools but can work with other systems if necessary	School*
Payroll	We currently use Edupay	We expect the school to move to Edupay.
HR	We currently use PHRP	Cost to school (school currently has to have HR support)
MIS system and system support	Our schools use RM Integris	School

	Pupil and Staff level	Ideally we would like all schools to move onto Integris ** (we are looking at Arbour as a whole trust approach)
Website Social Media	We have a centralised, standardised Trust Website The school will be expected to have a Twitter account and regularly tweet	Transfer costs are taken from the grant to academies. Information from the schools current Website can be transferred (where relevant)
Staff Absence Insurance		School* the trust often brokers this
Occupational Health (op advised)		School* the trust often brokers this
School improvement recording and reporting system	Perspective	This is a tool where schools who are RI or Special measures will need to transfer over unless their system is appropriate and robust**
Performance Management recording and reporting system	Perspective	
Admissions ranking from the LA (op)		School*
FSM checker (op)		School*
Health and Safety	We have a contract with a company called Elite but this is reviewed as contracts end	Ideally, we would like to move to Elite and would commission an audit with them.
Property compliance	We use a system called Parago to maintain asset lists, contractors etc. and would expect schools move to this.	School*
Engineering Inspection	We use Zurich	Trust
Energy consultancy (op)		School* the trust often brokers this
Fuel Oil, Gas		School * the trust often brokers this
Catering		School* Many of our schools have their own kitchen and staff, please speak to us with a good deal of notice when your contract is due for renewal

Moderation		The trust brokers this so that all schools have the same provision – we are currently with Walsall – through Challenging Education.
IT support	We have a contract with a company called StaffsTech but this is reviewed as contracts end	School* the trust often brokers this
Broadband		School* the trust often brokers this
IT monitoring	To check compliance (i.e. smoothwall PCE)	School* the trust often brokers this
IT antivirus	To check compliance	School* the trust often brokers this
Cleaning		School*
Caretaking		School*
RPA insurance		Trust
Governance – such as Governor Services / clerking or information Governance (op)		School* the trust often brokers this
Grounds Maintenance		School* the trust often brokers this
Swimming Services		School* the trust often brokers this with schools sharing pool time
Outdoor Education (op)	We have an internal approach of risk assessing and approving visits, we also buy into EVOLVE through the LA.	School* if you choose a contract
Reporting of Safeguarding / collating SENDCO and other support meetings to provide a chronology and be compliant.	My Concern	We expect transitioning schools to transfer onto this online reporting system. Please talk to us if you have a different online system
Other Contracts/Services you may have - TSSMAT can support you in attaining best value for money when your contract comes to an end. Remember to consider terms and conditions and timescales of coming out of a contract and the time needed to research options.		
Diocese SLA		School*
Photocopier		School*
CLEAPPS		School*
Sports partnerships or companies		School*

Any IT contracts such as I-pad management systems		School*
Other		
We have a variety of other subscriptions which, when purchased for several schools, can provide lower costs.		
We have two mini buses for use by our Trust Schools. This comes with a shared cost and requirement of qualified, permitted and medically assessed drivers.		

- The Accounting Officer is Charlene Gethin and the Chief Finance Officer is Shanie Cole.
- We use Xero as our main financial operating system and we bank with Lloyd's Bank.
- Our schools have monthly budget monitoring updates.
- The annual budget runs from September to August.
- The CEO and Finance Manager set the budget in partnership with the Executive Headteachers / Headteacher. This is presented to the Board of Directors for approval.
- Each school pays a percentage into the central Trust budget as follows:



- Good/outstanding schools 5%
 - Requires improvement/special measures schools: Due diligence financial reviews and discussions will take place regarding the level of need and % of 'top slice'. This will not exceed 7%
- This is to pay for central services and school improvement.
- This will be reviewed annually.

Financial accountability is taken extremely seriously at the Trust. We work closely with our auditors to ensure value for money is paramount with public funding. The financial position of the Trust is strong with a healthy surplus of cash funds available at the bank.

The Trust currently holds a healthy reserve to support school improvement activity. This will ensure that there is adequate cash flow to support schools within the Trust.

Academy conversion costs include:

Legal Fees, Solicitors fees,
 LA fees and for Church Schools, Diocese Fees
 Pension Actuarial Valuation
 Financial System Upgrade - as outline above
 Financial Due Diligence
 Premises Due Diligence
 Website Move
 Incorporation Costs

What happens when you decide to join TSSMAT?

Once you have researched several Trusts, and have thoroughly explored our Trust through our website and this documentation, and had discussions and visits with us, please let us know when you are ready to take the next step.

Useful links

TSSMAT <https://www.tssmat.staffs.sch.uk/>

DFE

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/987336/Building_strong_academy_Trusts_guidance.pdf

NGA

https://www.nga.org.uk/getmedia/6787e684-b01b-4e3a-b044-bc14ad774cf0/Guidance-Paper_Taking-the-next-step-joining-a-multi-academy-Trust_2.pdf

UNION

<https://neu.org.uk/academies> <https://www.nasuwt.org.uk/advice/academies.html>

<https://www.nasuwt.org.uk/advice/academies.html>

<https://www.ascl.org.uk/Help-and-Advice/Leadership-and-governance/Strategic-planning/Joining-a-multi-academy-Trust>

As part of the pre joining process, we conduct a range of due diligence activities with you in order to gain a full picture of your school. This process is as much about us finding out how we can work effectively with you as you finding out how you can work effectively with us.

The purpose of both parties carrying out due diligence is to ensure that you fully understand all of the opportunities, benefits, risks, assets, liabilities and relevant information to make a fully informed decision about whether entering into our Multi Academy Trust, or changing your Multi Academy Trust is the right decision for your own organisation.

The early stages of due diligence are informal and enable both the school and Trust to make informed decisions.

Academy recruitment / joining criteria

- Sponsored academies will be accepted on the recommendation/approval of the RSC after due diligence by the Trust Board of Directors.
- All academies will need to have the formal approval of the RSC before they can join the Trust.
- The Board will approve all new academies.
- All schools/academies will need to prove that they are financially viable or that the leadership/structural model adopted on entry is financially viable.
- A review of liabilities, premises, HR etc. will be explored and may be a limiting factor.
- All converter academies/existing single Trust academies (i.e. those deemed good or better by Ofsted) will be required to demonstrate what and how they will be able to contribute to the growth and development of the Trust.
- The Trust will need to be satisfied that all academies will fully engage with, and be fully committed to its vision, values, goals and tight principles and practice.



Final Steps



When the school / single academy Governors are resolute on their decision to join TSSMAT and Directors have decided to move forward with full Due Diligence, a team of staff and/or external consultants working on behalf of The Staffordshire Schools Multi Academy Trust will visit your school. This is a more rigorous process that allows the MAT to gain an understanding not just on what you can offer us but on what we can offer you.

Finally, the Due Diligence table nearer the end of our document outlines the expectations of areas which may be explored in readiness for conversion. Don't feel daunted, it is an important and steady part of the next step in the process and would also be the expectation of any good Trust to collect this level of information, we do it together!

Conversion

<https://www.gov.uk/guidance/convert-to-an-academy-information-for-schools>

<https://apply-convert-academy.service.gov.uk/>

Useful advice

https://cstuk.org.uk/assets/link_boxes/Guidances/CST-Deciding-to-Join-a-Trust-Guidance-v3.pdf

Once an agreement to apply to join the Trust has been made between all relevant parties, the central team will work alongside the school throughout conversion in order to facilitate the process.

Key steps on the journey include:

- Undertaking consultation (as required) with the community, parents and staff.
- All parties undertaking thorough due diligence in key areas such as safeguarding, education, HR, governance, admissions, finance and buildings.
- Formally applying to join the Trust and obtain Diocesan (if a church school) and the Secretary of State's consent.
- Informing the Local Authority.



- Ensuring that new financial systems are in place to manage funding.
- Ensuring that the school site is made available to the Trust via leases and supplemental agreements.
- Transferring, renewing or procuring new contracts, service level agreements and licences and purchasing relevant systems, RPA and other insurances as appropriate.
- Transferring under TUPE all contract arrangements for staff. This is a formal legal consultation process which is separate from any consultation on the conversion process with all stakeholders.

As outlined, formal consultation will need to be carried out later as part of the official process of applying to join a MAT but we are sure you are aware that taking stakeholders with you is a key aspect of change management, and it is all likely to go much more smoothly if people already know your plans and have had a chance to discuss them. Where possible, it makes sense to complete the consultation exercise before any formal application for becoming a MAT is submitted. However, it is still lawful for the consultation process to be carried out during or after the application process as long as the consultation is completed and all views taken into account before the final decision is taken.

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The final decision is usually taken at the point the MAT funding agreement documents are agreed and signed on behalf of the academy Trust.

Maintained schools

Maintained schools need to begin the process of conversion by completing a short online form to register interest in becoming an academy with the DfE. The DfE will then appoint a nominated project lead to get in touch with you and support you through the process of getting consent, converting to academy status and joining the MAT. The DfE has also produced a comprehensive online guide on converting to academy status, which explains in detail what is involved in this part of the process. This can appear rather daunting, but we are experienced in supporting schools through this process and take on much of the bureaucratic burden ourselves.

Single Academy Trusts and existing MATs

The formal procedure is different to maintained schools, as the transferring Trust is a charitable company. The main differences in the process are as follows:

1. Funding. While maintained schools still benefit from the academy financial support grant, Trusts wishing to transfer schools to other Trusts do not automatically receive any funding (although where a school is being 'rebrokered' by the DfE there may be sponsorship funding available).



2. Application to the DfE. Single academy Trusts wishing to join a MAT need to obtain the consent of the Secretary of State via the ESFA and/or the Regional Schools Commissioner. This process is initiated by the MAT (rather than the single academy) completing an application form.



Non-Negotiables for New Schools Joining the MAT

These shared and agreed set of non-negotiables have been developed over time and will remain under regular review as The Staffordshire Schools Multi Academy Trust grows. It is important that all prospective members of the Trust are clear about these 'non-negotiables' that underpin the work we do and sign up to them when joining The Staffordshire Schools Multi Academy Trust.



The Staffordshire Schools Multi Academy Trust vision is based on excellence through partnership. All stakeholders are to be clear about, and be able to articulate the Trust's values and vision. All schools share understanding of what it means to be part of The Staffordshire Schools Multi Academy Trust with the following:

- To display, support and embrace the shared vision and values of the MAT.
- Have regard to and action the provisions of the Articles of Association.
- Have regard to and action the provisions of the Governance Terms of Reference and Scheme of Delegation.
- To agree to a full governance post conversion induction process.
- To take on board all MAT systems of integration to ensure a cohesive approach for all schools (Finance, HR, Banking, IT) where applicable.
- Share joint responsibility to the improvement of all schools in the MAT.
- A willingness to be open and share 'outstanding' practice.

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- To share and support joint Training & Development across the MAT including the engagement in relevant staff meetings and CPD and to be willing and able to adjust staff meeting days and CPD time to co-ordinate planned cross Trust work.
- To fully support the work of the Board of Directors; including attendance at meetings, actions and deadlines.
- To ensure complete transparency on school documentation including SEF, SDP, Performance Management and Finance accountabilities.
- To engage joint assessment practice across the schools with all staff working together on moderation.
- To commit to an agreed financial percentage for implementation of central services, with percentage dependent on the needs of the school.
- To maintain robust systems of financial control including three-year budget forecasting, to ascertain the sustainability of current levels of expenditure.
- Implementation of all MAT policies/HR policies and procedures/and The Staffordshire Schools Multi Academy Trust contracts.
- To share a willingness to participate in all The Staffordshire Schools Multi Academy Trust events.

Non-Negotiables and Induction for Governance

As part of the pre-joining process, we conduct Due Diligence on school governance. This allows the Trust to agree a way forward that best meets the needs of the school.

We will work with schools to achieve the following:

- Identify the correct skills-base for the Local Governing Body (identifying new members, reviewing skills audit of current members, collating knowledge of governors' strengths of relationships within the school)
- Meet governors to discuss the transition and implementation process (including all governors reapplying for placement on the Local Governing Body and potentially the Board of Directors under The Staffordshire Schools Multi Academy Trust)
- Identifying training and professional development opportunities for governors, Chair and clerk.
- Arrange a full induction programme for all current and new governors going forward.



Governors are expected to:

- Re-apply for their role on the Local Governing Body.
- agree to the Scheme of Delegation and Governance Terms of Reference.
- Sign up to our Governors and Directors Code of Conduct.
- Complete the annual Register of Interests form.
- Commit to training and support throughout the year.
- Use TSSMAT email accounts.
- Receive Safeguarding and Prevent Training (taking into account their current training overview).
- One Governor to be nominated as lead finance governor, agreeing to meet the Trust Finance Manager termly.



Induction and transition for School Staff

It is important that once a school joins the MAT training is given in the first few months. This timetable allows staff the ability to understand staff roles in the Trust and gain a better understanding of how all the schools function as a whole.

- Headteacher joins the MAT Leadership Team (SLT) during the conversion/induction process.

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- Staff Induction handbook (relay new policies) and organisational chart.
- Safeguarding confirm completeness of single central record.
- Curriculum Lead Meetings: ensure that curriculum leads in English, Maths, EYFS, Foundation subjects and SEND are available for Trust Curriculum Leads Meetings.
- Induction pack for office: including scheme of delegation, academies handbook, financial regulations, and all other MAT policies.
- Copy of Corporate Calendar of Events (including moderation and assessment meetings).
- Induction pack for the Headteacher: MAT Strategic Plan, Template for Headteacher's Report, Self-Evaluation Form (SEF) and School Improvement Plan (SIP).
- Site visits and observations.
- Walk round of all schools for Heads and other relevant personnel.



FULL Due Diligence Checklist

NO	ITEM REQUIRED	INFORMATION PROVIDED AND NOTES	WE HAVE SET UP A GOOGLE DRIVE - WHERE TO SAVE DOCUMENTS.	CHECK ✓
SCHOOL CONTEXT, IMPROVEMENT, CURRICULUM AND ASSESSMENT				
1	Size of school	Please list here		
2	PAN	Please list here		
3	Forecasting of pupil numbers	Please list here		
4	Number of classes Size of classes	Please list here		
5	Pupil / Teacher ratios (if skewed with smaller groups, outline per class)	Please list here		
6	% and number: boys/girls/other, EAL EM Pupil Premium LAC including IAPLAC	Please list here		
7	% and Number of ECHP children List initials and hours (not names)	Please list here		
8	OFSTED (date / category and current evaluation category overall)	Please list here		
9	If Relevant SIAMS date and category	Please list here		
10	Awards / accreditations achieved and dates.	Please list here		
11	% pupils from in catchment Details of demographic of schools' catchment and intake beyond catchment.	Please list here		
12	Curriculum Map (annual / rolling plans, curriculum coverage)		School information and development	
13	Curriculum intent, implementation impact statement (curriculum guidance/policy)		School information and development	
14	Curriculum enrichments - e.g. of clubs - e.g. trips (range, how often per class etc. - e.g. events such as singing, concerts, showcasing of skills i.e. music, dance, sports, services etc.	List or attach a doc.		
15	School Improvement Plan		School information and development	

16	SEF		School information and development	
17	National Data (EYFS, phonics, KS1, KS2)		School information and development	
18	What internal data system do you use? How often do you collect data? Do you use standardised testing and if so which system and how often?	Please list here		
HUMAN RESOURCES				
19	Staff contracts, including any existing TUPE requirements and special conditions/clauses relating to that particular school/Academy		HR/Staff contracts	
20	Staff list showing roles - all staff. Populate form in folder		HR/Detailed staff overview	
21	Pay Policy		Policies	
22	Performance Management policy, system and process - all staff	Add system	Policies	
23	Organisation chart - all staff		HR/Organisation chart	
24	Job descriptions for all roles not following Staffordshire.		HR/non-standard job descriptions	
25	Information regarding any compromise agreements in the past 3 years		HR/Compromise agreements	
26	Details of any ongoing staff disciplinary cases if any (formal or otherwise)		HR/disciplinary	
27	Single Central Record		HR/Single Central Record	
28	Staff absence reports/statistics -	Outline capacity for cover e.g. HLTAs	HR/Staff Absence	
29	Directed time information		HR/Directed time	
30	Confirmation of SENDCO provision	Please list here		
FINANCE				
31	PFI school? If so full details of contractual arrangements		Finance	
32	Details of finance accounting software package	Add System		
33	Financial planning and monitoring systems	Add System		
34	Scheme of delegation		Policies	
35	Internal financial regulations		Policies	
36	Details of Pupil premium allocations with spend plans		Finance/Pupil Premium	
37	Details of sports premium allocations and statements/reports		Finance/Sports Premium	

38	Details of catch up premium funding allocations and statements/reports		Finance/Covid Catch up funding	
39	Private income streams including levels of income (re VAT)	Please list here		
40	Management accounts - current plus last 2 years		Finance/Management Accounts	
41	School Census, autumn, spring and summer for current and previous academic year		Finance/School Census	
42	Current year budget plan		Finance/Budget	
43	Three year budget modeller - minimum 3 years forward from current financial year		Finance/Budget	
44	Financial accounts for year ended 31st March 2020 and 2021 or 31 August 2020 and 31 August 2021 as appropriate – LA schools please provide end of year reports including details of reserves		Finance/Financial Accounts	
45	Insurance arrangements		Finance/Insurance	
46	Public Liability insurance claims in the last 7 years.		Finance/Insurance	
47	Ongoing property insurance claims if any		Finance/Insurance	
48	Details of any equipment lease contracts		Finance/Contracts	
49	Private nursery- copy of contract and financial arrangements (if applicable)		Finance/Contracts	
50	Financial analysis (business plan/accounts) of any significant trading activities undertaken e.g. in house catering, pre-school, wraparound facilities		Finance/Financial Accounts	
51	EYFS funding arrangements		Move to nursery	
52	Nursery pupils- age profile and full part/time split		Move to nursery	
53	Most recent UIFSM funding allocation	Please list here		
54	Cashless payment systems if any (for example Parent Pay)	Please list here		
55	Current MIS licences held		Finance/Licences	
56	Details of Voluntary School Fund account plus copies of bank statements for past 3 years		Finance/School Fund	
57	List of current contracts (please see the list and add any additional contracts),	Complete form provided and attach	Finance/Contracts	

58	Details of any fraud or financial irregularity (current year plus 7 years)		Finance/Fraud	
59	Debtors ageing report (over £100) with explanations for any items aged greater than 90 days (A)		Finance/Debtors	
60	Bad debt provision		Finance/Debtors	
61	Creditors ageing report (over £250) with explanations for any items aged greater than 90 days (A)		Finance/Creditors	
62	Details of outstanding corporation, VAT and payroll taxes due at the most recent balance sheet date/year end (A)		Finance/Creditors	
63	Corporation Tax Exemption documents (A)		Finance/Tax	
64	Any correspondence received from HMRC over the last six years (A)		Finance/Tax	
65	Details of any tax investigations over the last six years? (A)		Finance/Tax	
66	Copies of all VAT returns (A) for the past 7 years.		Finance/Tax	
67	Results of any HMRC inspections (A)		Finance/Tax	
68	List of all funding grants received	Please list here		
69	Potential contingent liabilities e.g. contractual conditions attached to grant funding received/.	Please list here		
70	Details of any other limited companies/charities which are under the control of the school/Academy	Please list here		
INFORMATION TECHNOLOGY				
71	Internet Capacity assessment (speed, supplier, annual cost, contract term, termination date)	Please list here or attach document	IT	
72	IT Inventory (to include asset owner, make, model, serial number, purchase date, purchase price, operating system)	Complete form	IT/inventory	
73	IT Network Infrastructure map (to include LAN & WAN topology, including fibre links & types between buildings)		IT/infrastructure	
74	IT Software (to include one off purchases, cloud / internet services / Mobile Applications - iPads)	Complete form	IT/Software	
75	Server Infrastructure (to include storage capacity per server, total available storage & remaining storage, server function e.g. Email /		IT/Infrastructure	

	Print Server / File Server, number of physical devices, number of Virtual Machines, Operating Systems, age of hardware)			
76	IT systems and hardware replacement/refresh frequency (method of procurement - lease / one of purchase)	Complete form		
77	Do all teaching staff have a device?	Please list here		
78	List of dedicated devices per class	Please list here		
79	IT support and maintenance arrangements (SLA, contract term)	Please list here		
80	Firewall, Internet access and filtering arrangements (who manages this?) - to include the solution in place	Please list here		
81	IT acceptable use policy-pupils and staff (to include a copy of current AUP & evidence of signatures / compliance)		Policies	
82	Backup & Disaster Recovery plan & date of last test (to include scheduled dates of historical testing & results)		Policies	
83	Wireless Network Solution	Please list here		
84	e-Safety Policy & date of last review		Policies	
85	Cloud storage solutions utilised (e.g. Office 365 / Google Docs)	Please list here		
86	Antivirus details including renewal date	Please list here		
87	VLE used (if any)	Please list here		
88	Any known issues (infrastructure or systems wide)	Please list here		
89	Website hosting / service in place	Please list here		
90	Location of MIS Database (on site / off site) - if off site, where is this stored	Please list here		
91	Phone system (number of devices, number of incoming lines, VOIP / ISDN solution) & management of this	Please list here		
92	Cyber security arrangements	Please list here		
PREMISES / HEALTH & SAFETY				
93	Most recent building condition survey and report, including any potential projected costs Anything to note re buildings – listed? Etc.		Health & Safety/Building Condition	

94	Details of any capital bids for the past 3 years including any retentions, conditions of funding and liabilities	Please list here		
95	Fixed asset register / inventory including details of any exceptional assets of high value e.g. works of art			
96	Details of any significant current equipment requiring replacement/upgrade excluding IT	Please list here		
97	Asbestos register		Health & Safety/Compliance	
98	Legionella risk assessment and logbook		Health & Safety/Compliance	
99	Building/estates development plans (if any)		Health & Safety/Development Plans	
100	Cyclical maintenance programme & status (if any)	Please complete form	Health & Safety/Compliance	
101	Current DEC and advisory report (Display Energy Certificate)		Health & Safety/DEC	
102	Details of any Japanese knotweed or other invasive plant species	Please list here		
10	Date of fixed electrical test survey	Please list here		
103	Date of most recent PAT report	Please list here		
104	Details of any BMS (Building Management System) including access credentials	Please list here		
105	Heating infrastructure overview and 3 years' service records/maintenance history		Health & Safety/Compliance	
106	Latest insurance inspection report for heavy plant items		Health & Safety/Compliance	
107	HVAC (Heating, Ventilation and Air Conditioning) service records/maintenance history		Health & Safety/Compliance	
108	Cleaning arrangements including contract details	Please list here		
109	Date of latest kitchen deep clean	Please list here		
110	Overview of kitchen equipment (appliances)- 3 years' service records/maintenance history		Health & Safety/Kitchen Equipment	
111	Inspection records for play and sports equipment		Health & Safety/Compliance	
112	Details of any school vehicles including MOTs, service history	Please list here	Health & Safety/Compliance	
113	Drainage plans including pumps and any condition surveys/maintenance history		Health & Safety	

114	Details of any lifts including maintenance history	Please list here	Health & Safety/Compliance	
115	CCTV system details (inc signage and policy compliance)	Please list here	Health & Safety/Compliance	
116	Fire alarm and emergency lighting system details, 1 year's maintenance history	Please list here	Health & Safety/Compliance	
117	Details of fire alarm monitoring arrangements	Please list here	Health & Safety/Compliance	
118	Any fire officer's enforcement notices and remedial action taken	Please list here		
119	List of PFFE (Portable Fire Fighting Equipment) and 1 year's maintenance history		Health & Safety/Compliance	
120	Intruder alarm system overview, 1 year's maintenance history		Health & Safety/Compliance	
121	Access controls system details and coverage	Please list here	Health & Safety/Compliance	
122	List of accessibility equipment and inspection records (hoists etc.)	Please list here		
123	List of moveable partition walls and latest inspection report	Please list here		
124	List of automatic doors and latest maintenance record	Please list here		
125	Details of any automatic gates including maintenance history	Please list here		
124	H&S Self Audit date, outcomes and associated action plans	Date level	Health & Safety	
125	Accident reports, including 'near miss' reports in the last 2 years		Health & Safety	
126	Potential liability claims		Health & Safety/Liability Claims	
GOVERNANCE				
127	Strategic plan		Governance	
128	Governing Body structure		Governance	
129	GB Committees and membership		Governance	
130	Governor skills audit and details of governor training undertaken		Governance	
131	Governors- category and term of office		Governance	
132	Governing body minutes- full for current and previous 2 years		Governance	
133	Risk register (if any)		Governance	
134	Governor training arrangements		Governance	
135	GB clerking arrangements		Governance	
136	All current policies - statutory and other		Governance	
137	Register of business interests		Governance	

138	Details of transactions with related parties		Governance	
139	Head's report to GB, current and last academic year		Governance	
140	All other Sub-Committee meeting minutes		Governance	
141	Finance Committee Meeting minutes		Governance	
142	Financial audit reports		Governance	
143	H&S Annual Reports, latest and previous 2 years		Governance	
SAFEGUARDING				
158	Details of Safeguarding leads (officer, deputy and Governor), and further training		Safeguarding	
159	How are safeguarding concerns logged	List		
160	Confirmation of Level 1 for all staff and volunteers			
161	Date and names of those attending Safer Recruitment training		Safeguarding	
162	Higher level (L3, L4) training for safeguarding leads.		Safeguarding	
163	Any ongoing or recently resolved complaints against the school and in particular the scrutiny of safeguarding complaints		Safeguarding	
DATA PROTECTION				
158	Freedom of Information requests, including responses	List or upload	Data Protection	
159	Number of Subject Access Requests in the current and last academic year	List or upload	Data Protection	
160	Number of Data breaches in the current and last academic year – are there any contentious data breaches	List or upload	Data Protection	
161	Data breach policy/procedure		Policies	
162	Copy of record retention schedule		Data Protection	
LEGAL				
163	Details of any significant issues where legal advice has been sought		Legal	
164	Claims history and any current claims		Legal	
OTHER				

165	Details of any partnerships, collaborations and/or joint ventures that are currently undertaken or are being arranged (formal or informal)	List or upload		
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Please read in conjunction with our growth strategy and school improvement strategy.

We are sure that this document and discussions with our Directors, CEO, Central Team and our serving Executive Headteachers / Headteachers will enable you to ask the right questions and make a fully informed decision. In our dialogue we will offer an honest appraisal of our position and offer and expect honesty in return. Thank you for taking the time to learn more about the Staffordshire Schools Multi Academy Trust.

We hope that you have found the enclosed information of interest and welcome you to contact us should you require any further information or wish to open a constructive dialogue in relation to joining our Trust.

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