



Department  
for Education

# Trust Partnerships

**Guidance for academy trusts and  
prospective joiners**

**May 2021**

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# **1. Summary**

## **1.1 About this guidance**

This publication provides non-statutory guidance from the Department for Education (DfE) for academy trusts which wish to set up formalised Trust Partnership arrangements with standalone schools (maintained schools and academies with only one school), outside their academy trust. This guidance explains what Trust Partnerships are and how they can be used. It sits alongside a [model service level agreement \(SLA\)](#).

This should be read in conjunction with our more comprehensive [guidance for academy trusts and prospective converters](#) which provides a broader overview of the benefits of the academy trust system.

## **1.2 Definitions**

Throughout this document:

- “academy trust” or “academy trusts” refers to multi-academy trusts with more than one school; and
- “school” or “schools” refers to local authority (LA) maintained schools or academy trusts with only one school

## **1.3 How this guidance was compiled**

This guidance has been created in conversation with sector leaders, including academy trust leaders and headteachers of maintained schools, who have run and participated in Trust Partnerships.

## **1.4 When this guidance will be reviewed**

This guidance will be reviewed on an ongoing basis.

## 2. What are Trust Partnerships?

### 2.1 About Trust Partnerships

A Trust Partnership is a time-limited arrangement, allowing schools to partner with an academy trust. It does not deliver the full benefits of joining an academy trust but is a time-limited way for a school to benefit from trialling membership in an academy trust and explore how a permanent arrangement might work. This guidance provides information, case studies and model SLA to support academy trusts and schools to establish Trust Partnerships.

### 2.2 Summary and background

A Trust Partnership is a sector-led arrangement where an academy trust works with a school, realising the benefits of a formal relationship to access the academy trust's networks and services at an agreed cost through a service charge. It can be a powerful school improvement tool providing quick and accessible support from a strong trust. These arrangements are often governed through formal documents, and a model SLA is published alongside this guidance. As the ability of both parties to set terms and conditions that work for them is key to successful Trust Partnerships, we have drafted the model SLA to be as flexible as possible and, although written for a partnership with an LA maintained school, it can be adapted for use also for an academy trust with only one school.

Trust Partnerships are not a replacement for converting to academy status or a routine preliminary step before academy conversion takes place. They may also help support schools awaiting conversion by allowing them to work collaboratively with the academy trust before the conversion process is completed.

### 2.3 Key components of Trust Partnerships

There is no single model of Trust Partnership but it should have the following key components:

- i) It should be **time-limited**, typically 12-18 months. It is imperative that none of the parties involved considers Trust Partnerships as a long-term solution, or a replacement for conversion.
- ii) During the partnership, the governing body of the school **should give due consideration to academisation/merging** through formal consultation where required.
- iii) Activity undertaken as part of the partnership should **focus on teaching and leadership**. Trust Partnerships are usually focused on activities such as academy trust-wide training opportunities, headteacher mentoring and support, and cross-trust data benchmarking of data.

- iv) All arrangements should be **recorded** through formal documentation. Whilst documents may vary, academy trusts have expressed the importance of each party being clear from the outset about the terms, any costs, expectations, and objectives of the arrangement.

## 2.4 Role of the department

The department will have no formal role in any Trust Partnership arrangement. If a school is eligible for the [Trust and School Improvement Offer](#) funding may be provided to support this.

We recommend schools considering entering a Trust Partnership notify their relevant [Regional Schools Commissioner \(RSC\) office](#) of their plans.

## 2.5 Advice for schools and trusts considering a Trust Partnership

Advice for trusts considering offering Trust Partnership arrangements:

- Make sure you are clear from the outset on the **objectives of the relationship**. Ensure you know what the offer will be, including the expectations of what each party will bring to/expect from the arrangement.
- Take time to consider the “**hidden costs**” of any arrangement – particularly the amount of time and resource needed from academy trust leaders.
- **Due diligence** is essential if the relationship is to provide effective school improvement, as is flexibility to deal with unexpected issues.
- Consider what additional evidenced based [professional development and support](#) may be available, that meets the needs of the school.

Advice for schools considering entering a Trust Partnership:

- Make sure you are clear from the outset on the **objectives of the relationship**. Ensure you know what the offer will be, including the expectations of what each party will bring to/expect from the arrangement.
- Take time to consider and engage the right academy trust.
- Take time to consider the “**hidden costs**” of any arrangement– particularly in the amount of time and resource required from the leadership team.
- Be aware that these relationships are **time limited**. They allow you to experience the benefits of being in a particular trust as you consider joining.
- Church schools should consult their diocese prior to seeking a Trust Partnership and receive consent to do so. Similarly, other schools with a religious character should

consult and receive the consent of their religious authority prior to entering a Trust Partnership arrangement.

### **3. Examples**

#### **STEP Academy Trust**

As of April 2021, STEP (Striving Together for Excellence in Partnership) Academy Trust have had eight schools join the academy trust having initially worked under a Memorandum of Understanding (MoU) arrangement. Two schools are currently working under an MoU. One school did not join, having worked for six months under an MoU arrangement.

STEP routinely ask schools to engage in a trial period, or associate membership, covered by an MoU. These typically last six months, with the agreement detailing the support that will be provided, educational and operational, and expectations regarding how the partnership will be conducted. From the outset the potential partner school must be open to joining the academy trust. There is an expectation that if both parties are satisfied with the arrangement, converting to academy status will be the logical next step. This expectation is included in their MoU, with an agreed date at which the long-term future of the partnership will be considered.

Schools that have had reservations about converting to academy status often become convinced by the benefits after experiencing them first-hand. It is the opportunity to establish good relationships on which an effective partnership can be built, which is why it is STEP's favoured approach.

The impact of this approach on partner schools and the academy trust itself has been significant. For example, Gloucester Road Primary School in Peckham, which became Angel Oak Academy, had for many years been vulnerable prior to joining STEP. Working initially under an MoU before deciding to convert to academy status with STEP, the school is now one of the strongest in the academy trust, judged outstanding by Ofsted.

#### **The Olympus Academy Trust**

The Olympus Academy Trust had 8 member schools all within 4 miles of one another and all in the lowest-funded LA area in England. When Winterbourne Academy the largest secondary school in the area, needed help it was a positive potential partner for Olympus, who were keen to offer support to a neighbouring school community.

The initial objectives of the partnership were to avoid a projected £1 million deficit, stabilise the school and academy trust leadership and prepare both schools to be re-brokered into different academy trusts which would involve significant re-structure and change. Olympus

hoped to be able to conduct due diligence to determine whether Winterbourne would be a good fit for its trust, in the longer term. In previous years, three schools had been re-brokered into Olympus with structural deficits on transfer. Trustees were, therefore, cautious about future projects.

Working under an SLA, the Olympus CEO undertook the role of Interim CEO at the Federation for 2 days a week and a full-time Headteacher was seconded from a neighbouring academy trust (with whom Olympus shared a Teaching School) under a separate SLA. An Interim Board had already been established and a decision made to re-broker the two schools in the Federation into different academy trusts as a Financial Notice to Improve had been issued and its largest school, Winterbourne, was deemed inadequate by Ofsted and in need of special measures in the second week of Olympus' support in January 2017. The Interim Board commissioned an independent audit of the finances. It was identified that a major re-structure was needed to reduce central costs. A shadow structure was created, aligning with Olympus tariffs and structures. In preparation for joining Olympus, new finance and budgeting systems were introduced and improved financial processes and reporting were embedded.

By the summer, the deficit had been removed and a loan was repaid to the ESFA although substantial restructuring costs were incurred. Olympus Trustees were able to approve Winterborne joining the academy trust with confidence as financial viability was established along with a curriculum designed to improve outcomes, unlike in other re-brokerages the academy trust had experienced with less detailed financial knowledge on transition. Another key factor in providing support for a year before joining Olympus was that staff confidence and morale was high about joining when it finally happened.

## Further information

### Other relevant departmental advice and statutory guidance

- [Building strong academy trusts: guidance for academy trusts and prospective converters](#)
- [Trust and School Improvement Offer](#)
- [Model service level agreement \(SLA\)](#)
- [3. Set up or join an academy trust - Convert to an academy: guide for schools - Guidance - GOV.UK \(www.gov.uk\)](#)
- [Information note for academy trusts about academy transfer - GOV.UK \(www.gov.uk\)](#)



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