



Department
for Education

Trust Partnerships

Guidance for academy trusts and
prospective joiners

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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 who 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

Trust partnerships are a time-limited arrangement, allowing schools and trusts to come together in mutually beneficial partnerships. They do not deliver the full benefits of formally joining an academy trust but are a time-limited way for all parties to explore how a permanent arrangement might work. This guidance provides information, case studies and a 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 a school and trust work together, testing whether a formal partnership will benefit both parties. There are a variety of reasons why a trust and school might choose to enter a trust partnership. Partnerships can allow strong schools and trusts to explore the benefits of collaborating (for instance, sharing expertise through headteacher and subject expert networks). They also allow a school to access a trust's networks and services. Trust partnerships can also be used as a powerful school improvement tool, allowing vulnerable schools to access support from a strong trust.

Trust partnership arrangements are often governed through formal documents. The ability of both parties to set terms and conditions that work for them is key to a successful partnership. The model SLA, published alongside this guidance, is intended to be adapted to individual circumstances and used flexibly. 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. Similarly, although written for partnerships providing school improvement support, it can be adapted for other uses.

Trust partnerships are not to be considered a replacement for converting to academy status or a routine preliminary step before academy conversion takes place. Although, they may 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

Whilst flexibility is vital to trust partnerships, the following components are key to any arrangement:

- i) It should be **time-limited**, typically 12-18 months. It is imperative that none of the parties involved considers a trust partnership 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 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 approving most trust partnership arrangements. However, if a school is eligible for the [Trust and School Improvement Offer](#) funding may be provided to support a partnership arrangement, subject to DfE approval.

We do however ask that schools and trusts 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 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 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 contractual 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 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

Hawthorne Primary School and Flying High Trust

Flying High Trust was formed in 2012 and over the last 9 years has steadily grown across Nottinghamshire, Nottingham City and Derbyshire and now consists of 30 primary schools. Hawthorne Primary School is a one form entry primary school with nursery provision from age 3.

Flying High Trust worked with Hawthorne Primary School in a partnership that has led to Hawthorne formally joining the trust. This partnership gave Hawthorne access to continuous professional learning as well as providing the opportunity for its leaders to share their expertise through headteacher and subject expert networks and meetings.

Having the opportunity to work together before formalising the arrangement brought many benefits to the school and trust. Both parties had a good understanding of each other's priorities, and Hawthorne and its leaders felt connected to the trust and understood its ways of working. This built confidence in staff and governors at both Hawthorne and Flying High that this was the right relationship for them.

Once it was clear Hawthorne would join Flying High, further activities were put in place designed to both maintain the progress of the school but also enable leaders, staff, and governors to learn more about working together. This included headteacher briefings and meetings providing crucial guidance, support and development enabling a connection to other heads across the trust and central team.

Hawthorne Primary School have benefitted from access to trust activities including trust systems and processes, communications, events for children, governor hub and recruitment activities.

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 Winterbourne 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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