

 #MATformation

Establishing or Joining Multi-Academy Trusts

Legal support, practical strategies and unbiased advice to support and guide your decision to join or form a Multi-Academy Trust

www.oego.co/MATformation17

Expert speakers include:

Dr Tim Coulson

Chief Executive, Samuel Ward Academy Trust
& former Regional Schools Commissioner

Clare Collins MBE

Head of Consultancy, National Governance
Association

Nick Mackenzie

Partner, Browne Jacobson LLP

Karen Burns

Chief Executive, Carillion Academies Trust

KEY BENEFITS

LEGAL SUPPORT

Remain legally compliant
when joining or
forming a MAT

UNBIASED ADVICE

Take part in *The MATs
Debate* and understand the
pros and cons

PRACTICAL GUIDANCE

Processes, pitfalls and
step-by-step guides to
support your journey

Establishing or Joining Multi-Academy Trusts

Despite political upheaval, a lack of clarity, and seemingly constant shifts in the education landscape, the decision of whether to join or form a multi-academy trust remains ever present for the majority of school leaders.

- Do you know the common pitfalls to avoid when forming a new multi-academy trust?
- Are you looking to join a trust but worried about losing your autonomy?
- Do you have the legal and financial knowledge in your school to ensure a smooth transition?

This timely event is a vital opportunity to gain legal support and practical guidance to ensure you make the right decision for the future of your school, staff and students.

Why attend this event in 2017?

- **Pros and cons:** Hear unbiased views on the benefits, challenges and potential pitfalls of joining or forming a MAT
- **Retaining autonomy:** How to identify your non-negotiables and find a MAT that fits your current vision and allows individual school decision making
- **Governance:** Understand how governance will change if you join a MAT, and gain strategies to build a robust board of trustees when forming your own MAT
- **Finance:** Clarify your legal financial obligations and ensure robust financial management as a trust

Who should attend?

This event is for schools and single academies who are considering joining or forming a MAT, or wish to find out more about the available options.

- Headteachers
- Principals
- School Business Managers
- Governors
- Finance Managers
- HR Manager

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This year's speakers include...



Tim Coulson

Chief Executive, Samuel Ward Academy Trust & former Regional Schools Commissioner

Before his appointment as the Regional Schools Commissioner for the East of England and North-East London, Tim was Director of Education at Essex County Council. Earlier in his career he taught in London primary schools and was Headteacher at William Tyndale Primary School. In August, Tim takes on the role of CEO for the Samuel Ward Academy Trust



Joan Binder

Vice Chair, FASNA and Chair of Governors

Joan is currently Vice Chair of FASNA and Chair of the Board of Trustees of a large 11-18 pupil converter academy in Essex. She has been involved in governance across all phases of schools for over 30 years. With a professional background in education Joan has taught in both the secondary and primary secondary sectors and in the adult education service.



Brian Lightman

Education Consultant and former General Secretary of ASCL

Brian Lightman was General Secretary of the Association of School and College Leaders from September 2010 - January 2016. Now a self-employed leadership specialist, he has a wide-ranging portfolio which includes working with individual and groups of schools providing coaching for middle and senior leaders, professional development and support for school improvement.



Karen Burns

Chief Executive and Executive Principal, Carillion Academies Trust

Karen joined the Trust in April 2015 as Executive Principal, following a successful Deputy Headship involving the amalgamation of two schools in Stockport. Karen's position before joining the Trust was as a highly effective Headteacher of a primary school in Ashton. In January 2016 Karen was promoted to Chief Executive of the Trust.



Nick MacKenzie

Partner, Browne Jacobson LLP

Nick leads the education team on corporate and governance matters and heads up the firm's Birmingham education team. He has particular expertise in developing innovative approaches to academy groups, collaborations in the education sector and Teaching Schools.



Naseem Nabi

Partner, Veale Wasbrough Vizards

With over 10 years' experience of the education sector, Naseem is well placed to advise on all aspects of employment law. Naseem has particular expertise in acquisitions & mergers and associated TUPE issues, restructuring and redundancy. Naseem also advises the firm's academy conversion clients, supporting them through the conversion process.

09:00 – 09:45	Registration and refreshments		
09:45 – 10:00	Chair's Introduction & Welcome <i>Brian Lightman, Education Consultant and former General Secretary of ASCL</i>		
10:00 – 10:40	In conversation with Dr Tim Coulson <ul style="list-style-type: none"> - The key benefits that involvement in a MAT can provide - Effective MAT leadership: challenges, opportunities and common pitfalls - The role of the RSC and what the future might look like <i>Dr Tim Coulson, Chief Executive, Samuel Ward Academy Trust & former Regional Schools Commissioner</i>		
10:40 – 11:20	Keynote 1		
10:40 – 11:20	The MATs debate: A factual, balanced discussion on the pros and cons of joining or establishing a Multi-Academy Trust <ul style="list-style-type: none"> - Is there such a thing as economies of scale in the majority of MATs? - Does joining a MAT have to result in diminished autonomy? - Are MATs successfully improving student outcomes and raising standards? - What is the role of 'trust' in a MAT? <i>Clare Collins MBE, Head of Consultancy, National Governance Association</i> <i>Nick Mackenzie, Partner, Browne Jacobson LLP</i> <i>Joan Binder, Vice Chair of FASNA and Chair of Governors</i>		
11:20 – 11:30	Questions		
11:30 – 12:00	Morning Refreshments		
12:00 – 12:50	Streamed Sessions 1		
1A: A practical guide to forming a MAT	1B: Aligning values and ethos	1C: Due diligence	1D: MAT-wide technology and cost saving
Practical insights from a recently formed Multi-Academy Trust on the processes, pitfalls and compliance issues involved in setting up a MAT <i>Gain a process checklist on the journey</i> <i>Jeremy Rowe, CEO & Ali O'Connor, Director of Business and Finance, Waveney Valley Academies Trust</i>	How to ensure your vision is aligned with any potential partner and find a balance between maintaining your school values and embracing a new culture <i>Debbie Godfrey-Phaure, CEO, Avonbourne Multi Academy Trust</i>	Understand the due diligence process, clarify the different approaches available and ensure the financial and legal position of the whole group is clear and transparent <i>Nick Mackenzie, Partner, Browne Jacobson LLP</i>	Key steps and tips to successfully utilise technology to realise cost savings and enable sustainable growth of a Multi-Academy Trust <i>Jesse Johnson, Head of Multi-Academy Trusts, RM Education</i>
12:50 – 13:50	Lunch		
13:50 – 14:40	Streamed Sessions 2		
2A: Establishing an effective board	2B: Retaining autonomy	2C: Staff structures and HR	2D: The evolving role of the SBM
How to build a robust, impactful board of trustees capable of strategically guiding your MAT and offering critical support and challenge <i>Joan Binder, Vice Chair of FASNA and Chair of Governors</i>	Can you join a MAT and retain your autonomy? How to identify your non-negotiables and find the right MAT to allow individual school decision making <i>Leave with a list of questions to ask potential partners</i> <i>Karen Burns, Chief Executive, Carillion Academies Trust</i>	Enhance retention by successfully harmonising staff terms and conditions, reassuring employees and unlocking the benefits of the larger workforce available through a MAT <i>Naseem Nabi, Partner, Veale Wasbrough Vizards</i>	Moving from an operational to strategic role: Clarify new responsibilities and gain strategies to manage increased workload and accountability <i>Matthew Clements-Wheeler, Business Manager and Deputy Head, Bordesley Green Girls' School</i>
14:40 – 15:00	Afternoon Refreshments		
15:00 – 15:50	Streamed Sessions 3		
3A: Finance	3B: Exploring approaches to local governance in MATs	3C: The role of the CEO	3D: Other models of collaboration
Financial compliance as a Trust: Clarify your legal and financial obligations, understand the different financial structures and ensure robust financial management <i>NASBM Representative</i>	Understand how the roles and responsibilities of your existing governing body are likely to change when joining an MAT <i>Clare Collins MBE, Head of Consultancy, National Governance Association</i>	How to manage the transition from Headteacher to MAT leader: New responsibilities, crucial first steps and ensuring support from key stakeholders <i>Karen Burns, Chief Executive, Carillion Academies Trust</i>	Are MATs the only way forward? Understanding alternative models of school collaboration, the pros and cons of each and how to decide what's right for your school or academy <i>Read our resource on options for collaborative structures</i>
15:50 – 16:20	What does the research say about the success of the Multi-Academy Trust movement and has enough research been conducted to present tangible arguments about the benefits of MATs? <i>National Foundation for Educational Research</i>		
16:20 – 16:30	Questions and closing remarks		
16:30	Conference Close		

Establishing or Joining Multi-Academy Trusts

One Day National Conference - 29th November 2017, London

How to register

1. Book online and receive instant confirmation
oego.co/MATformation17

2. Email: james.allen@optimus-education.com

3. Questions: Call James on 020 3325 0362

Please see www.oego.co/TandCs for our subscriptions, cancellations and refund policy

Pricing

Prices	Book before 29/09/17	Book after 29/09/17
Primary	£269 + VAT	£299 + VAT
Secondary	£349 + VAT	£379 + VAT
LAs	£399 + VAT	£429 + VAT
Others	£429 + VAT	£459 + VAT
Unlimited CPD	Included in your Unlimited CPD membership fee	

Booking reference

1

Before
the day

Create your account at oego.co/EstMATResources and read our resource on different options for collaborative structures

PLUS

- View our webinar on managing change when joining a MAT
- Make use of our self-assessment survey to see where you require further support

2

During
the day

Have your burning questions answered by our experts and outstanding practitioners

PLUS

- Discuss challenges with peers and build up a network of support
- Select targeted workshops to suit your specific need

3

After
the day

Log in at oego.co/EstMATResources to access more resources and external support to help reach the right decision for you

PLUS

- Download the speaker presentations and share these with colleagues
- Use the self-assessment survey to see what you've learned

4

Share
across your school

Share the governance handbook and new competency framework for governors

PLUS

- Share our list of questions to ask potential partners to ensure a good fit for your school
- Download our legally approved due diligence checklist

Start accessing these resources today by creating a free delegate account on oego.co/EstMATResources

Remember, Optimus Unlimited members can attend and access resources for 35+ conferences a year! Get in touch to learn more.