



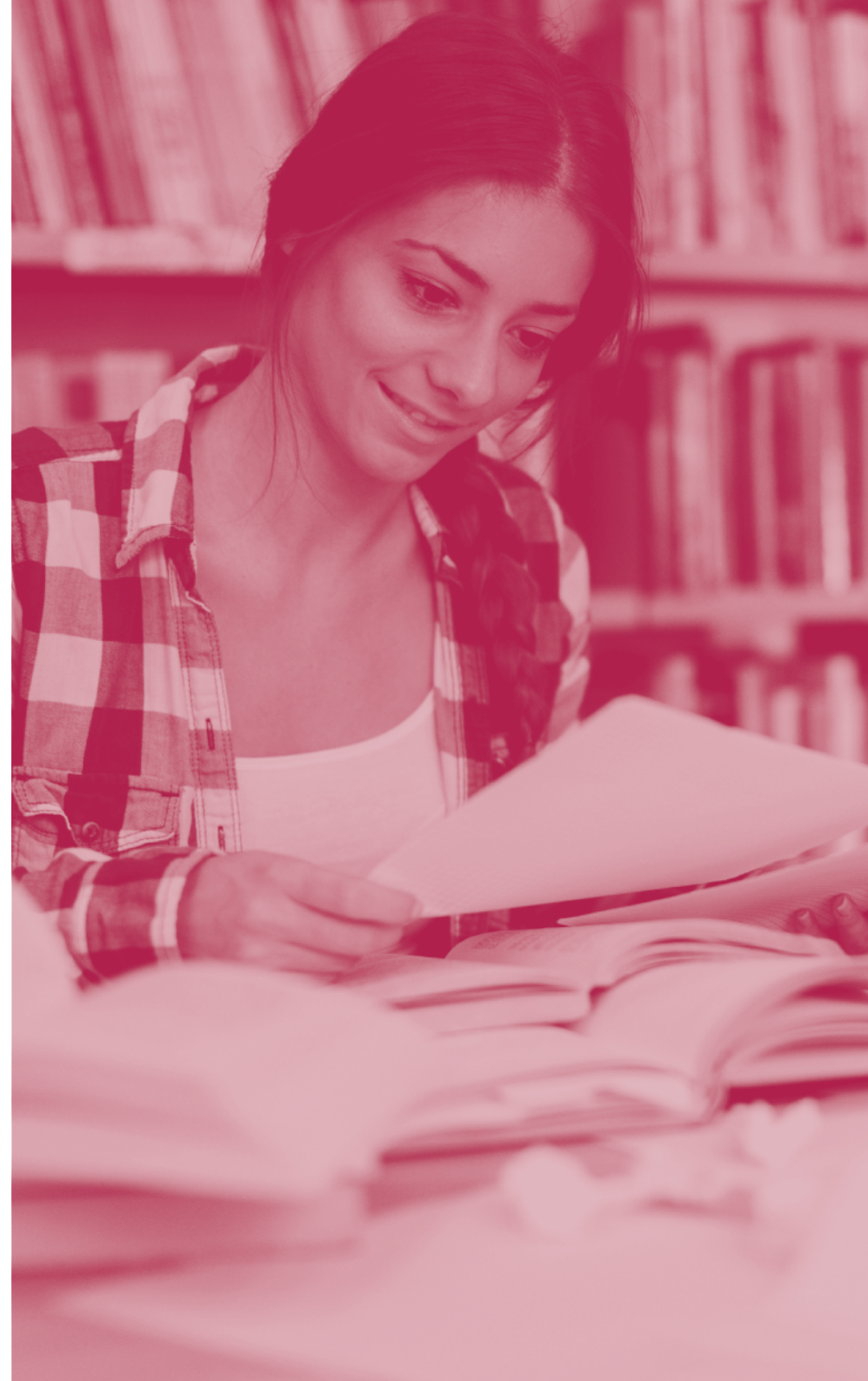
Responding to the changing landscape for education

A five point plan for academisation success

Becoming strong, improvement focussed and sustainable

Whilst academy status continues to offer freedoms, it also brings serious accountability and growing financial management expectations. The new edition of the Academies Financial Handbook (September 2016) stresses, more than ever, the importance of sound financial management. Recent scrutiny by the Local Government Association adds to the pressures you will face as an academy.

As you decide whether to join or lead a single or multi-academy trust (MAT), it is crucial not to overlook the functional side of school management and ensure everyone is ready for what is expected of them. In this white paper we explore the five key steps required and how to prepare to run your school as an academy.



1. Seek advice from your member organisations

The process of becoming an academy brings additional workload to your leadership team and governors. The first step is to seek as much advice as possible. Talk to others who have been through the process to understand the pitfalls, the benefits and who they recommend for professional advice and guidance.

Don't overlook bodies such as the National Association of School Business Management (NASBM) and the National Governors' Association (NGA). These organisations have a wealth of experience and offer confidential advice and guidance.

2. Decide on the structure

Once you are sure that academy status is for you, the next step is to decide on the structure. The way your school operates now is likely to be the greatest influence on whether you join or lead a single or multi-academy trust. Considerations include:

- ♥ The long-term sustainability of your school and demographics in your area
- ♥ The capacity of your leadership and governance teams to take on additional responsibilities
- ♥ Your willingness or need to accept external leadership and support
- ♥ Your network of schools and how you collaborate with others
- ♥ Your ethos and how it aligns with that of trusts you could join or schools you could lead

If you are looking to join a trust, the Department for Education's Academy Sponsor Contact List details all multi-academy trusts by school commissioner region.



3. Understand your responsibilities and identify skills gaps

With freedom comes responsibility. As legal entities, academies take on increased accountability. The Academies Financial Handbook 2016 outlines the responsibilities involved; compliance with these is a requirement of academy trust funding agreements.

Once you are aware of your responsibilities, the next step is to identify and fill any gaps in understanding across your governance. The National Governors' Association (NGA) provides a free auditing tool and skills matrix. The NGA explains that no single governor is expected to have all the skills listed, but that the full skill set should be covered across the governing body. The skills matrix maps skills across the group, making it easier to identify gaps, strengths and development needs.

The likelihood is that you will need to call on external providers to upskill your colleagues or recruit for the additional skills you need.



4. Identify appropriate strategic partners

Understanding your future needs isn't just about capacity in staffing. It also covers the software and services you use and how well they, and the supplier that provides them, can meet your changing requirements. The contracts and licences you currently hold for products and services are between the suppliers and your school and will not be valid once you change status. Some will need to be relicensed at additional cost.

Review incumbent suppliers

Audit your suppliers, their products and contracts and what they will look like, including costs and service level agreements once you are an academy, as well as what your academy trust will supply, if relevant. Consider if they will meet your changing needs, provide good value for money and research alternatives. RAG (red, amber, green) traffic light rating is a useful exercise.

Identify strategic partners

The government's 'Buying for Schools' guidance gives step-by-step advice and support on school procurement including framework agreements, enabling you to evaluate which suppliers offer the best-value option for your new academy. Referring to the approved partner organisations of associations also gives a level of reassurance as you look for new suppliers.

Consider engaging with suppliers who have guided other schools through academisation. They will bring several years of experience and can save you time, as well as reassuring and advising you and your team through the conversion process. Consider what you need from a strategic partner and find one with the best fit.

Identify gaps in software and service provision

As you work through your supplier audit, it will become apparent which products and services no longer meet your academy needs. As a minimum, the software you choose should match your academy goals and regulatory expectations. There should also be a clear roadmap of future developments showing how the product will grow with you.

Prioritising your new software needs

► Financial software

With growing financial pressures, your priority is to implement a financial management product that, as a minimum, meets all new expectations. Using outdated financial software that doesn't meet your new needs is a dangerous and potentially costly decision. Choosing the right software reduces risk, creates efficiencies and empowers staff.

► Human resources software

Your second priority is to find a system to support your new responsibilities to employees. A solution that connects finance, payroll and even recruitment can save you money and greatly improve efficiency. Finding suppliers that offer a complete suite of interrelated academy products can offer better value for money as you work with fewer suppliers and systems.

► Other requirements

You should review what other software requirements you will have. For example, will you require Facilities Management if you're creating a MAT? Talk to suppliers who are specialists in education software and those that can offer all the systems you may need.

5. Understand value for money

A critical step in converting is understanding and being able to demonstrate 'value for money'. As an academy, you will be subject to public standards of accountability and the Education Funding Agency (EFA) insists that, whether you are part of a single or multi-academy trust, you understand and demonstrate value for money. This is defined as 'achieving the best possible educational outcomes through the economic, efficient and effective use of resources'. The National College for Teaching and Leadership (NCTL) points out that linkage between the 'three Es' of economy, efficiency and effectiveness is not always explicit.

What do the most efficient schools look like?

'We have found that the most efficient schools maximise their investment in teaching staff, activities and learning resources that make the greatest difference to pupil outcomes – and they are creative in minimising all other running costs. Their focus on efficiency also creates more robust management systems that reduce the risk of financial irregularities.'

DfE 2013

The time is now

As you begin the process of academisation, evidence shows that understanding and following your new financial obligations should happen as quickly as possible. Your capacity to deliver them, whilst remaining focussed on your school's core purpose, is key to determining the structure of academy you choose.

Once your structure has been chosen, working with strategic partners and suppliers who can support you to deliver your expectations and value for money is the next step. The right relationships can support your journey, help ensure your aims are met and support you to evolve into the strong, improvement focussed and sustainable academy your pupils and community deserve.



References and further reading

Department for Education
Academy Sponsor Contact List
<https://www.gov.uk/government/publications/academy-sponsor-contact-list>

Education Funding Agency
Academies Financial Handbook 2016
<https://www.gov.uk/government/publications/academies-financial-handbook>

National Association of School Business Managers
www.nasbm.co.uk

National Governors Association
www.nga.org.uk

The National College of Teaching and Leadership
www.nationalcollege.org.uk

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