



A Create: Schools Resource

Vision for Trust Growth Guidance

Private & Confidential

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1. Introduction

Your trust's growth plan is a central element of the Vision section (section C) of the free school application form. You must provide a brief outline of your growth plans and where the free school sits within these. This is your opportunity to show the DfE that the new school is part of a sustainable, ambitious growth plan for your trust which meets the Government's vision as laid out in the White and Green papers.

The specific criterion you must meet here is:

- the number of schools you plan to have in total
- your planned geographical spread and timescales
- a summary of any discussions you have had with the relevant regional directors' teams

We recommend including your trust's growth strategy as a specific, titled sub-section to ensure that it is clear to the DfE's assessors that you are meeting this criterion.

Of course, this is only one element of the Vision section. For help with writing or reviewing other aspects of this section, please see the support Create: Schools can offer on our website [here](#). It should be used in conjunction with the guidance and criteria issued by the DfE for the three free school waves, or presumption competitions if applicable.

2. Writing Your Growth Plan

2.1 Content

This sub-section should be a summary of your existing growth plans, situating the proposed free school within these. It should therefore reflect an existing growth strategy, or one which you develop alongside the free school application.

We strongly recommend that you include at least this information in this sub-section:

- The number of schools you plan to have in total. You should take into account the Government's expectations that all trusts will work towards having at least ten schools.
- Anticipated timescales for expansion,
- Planned geographical spread and the rationale behind this
- Planned expansions, academy conversions and sponsorship of schools, including any schools with whom you have already spoken with.
- Free schools which have already been approved but which have not yet opened.
- Any discussions you have had with Regional Schools Commissioners, MPs, Local Authorities (LAs) and key stakeholders regarding the trust's growth strategy.

As your growth strategy will be unique, so will this sub-section. We strongly recommend, however, that you explain plans across at least the next three to five years wherever possible.

2.2 References

Your capability and capacity to establish a new school while maintaining and improving standards in the trust's existing schools, should be outlined in depth in Section E. However, you should briefly reference this in Section C, and signpost the assessor to Section E to demonstrate consistency in your bid.

2.3 Length

The DfE does not specify a word limit for each sub-section of Section C, however for each wave there is a word count for section C overall – for example, 2000 words for mainstream

and 1000 for AP. Each free school application is unique and should be written based on your circumstances as a trust. As a rough guide, we recommend that this section should be in the region of 300 – 400 words. If you have an existing growth strategy published on the trust website, or a written document, you are able to include this as an annex in the bid.

3. Options for Growth

3.1 Growing Existing Academy Trusts

Trusts should talk to their RSC office about the possibility of growth. The RSC office will want to:

- Be sure that you are able to meet the needs of the schools currently within your academy trust.
- Understand your motivations for growth.

The ESFA can provide advice on your financial plans, to ensure that growth will not impact upon longer-term financial sustainability.

3.1.1 Due diligence

Academy trusts must strike a balance between:

- Supporting additional schools.
- Maintaining standards at the schools they already manage.

When considering whether to grow, an academy trust will need to consider:

- The geographical fit of schools.
- The educational, financial and capital risks.

The process of considering these factors is often referred to as [due diligence](#).

The growth of church academy trusts will be in accordance with the wider diocesan strategy. Academy trusts and dioceses must work closely with their RSC office when considering growth.

The decision about whether a school joins your academy trust should be taken by both the governing body of the school and your academy trust board before being taken to the RSC for a final decision.

To support academy trusts to grow, the Trust Capacity Fund (TCaF) is available, please contact Premier Advisory Group for [support with TCaF4](#).

3.2 Sponsoring a School

You may be approached by your RSC team to consider [sponsoring a vulnerable school](#) with an Academy Order. If a non-diocesan school has been served with an Academy Order it means that the:

- School must join an academy trust for urgent and sustainable improvement.
- Decision about which sponsoring academy trust the school will join lies with the RSC, although they will take the school's views into consideration.
- Transfer should take no more than 9 months.

If a church school has an Academy Order, conversations will place between the RSC and the diocese as per the MOUs between the churches and the department.

RSCs will [assess you as a sponsor](#) and look at your academy trust's track record of driving improvement. The assessment can take place at the same time as the decision about the school with the Academy Order joining your academy trust.

You should:

- Consider both the short and long-term needs of the school.
- Work with the local authority and RSC on any immediate short-term support for the school.

Once the decision is made about which academy trust will sponsor the school, the academy trust can become more involved in the:

- Direct improvement work.
- Finance and governance support.
- Decisions about staffing.

There are funded tariffs to support schools with an Academy Order once they have joined an academy trust which your RSC will talk to you about.

3.3 Converting a School

Non-diocesan academy trusts that have capacity to grow should be active in engaging schools in their local area that may be interested in conversion.

Trust Partnerships is a sector-led initiative which allows schools to collaborate with academy trusts in order to decide whether conversion is right for them.

Before voluntary conversion, both parties should consider:

- The short and long-term needs of the school and academy trust.
- The opportunities that growth presents.
- What capacity you will need to support schools joining.
- What the school(s) bring or what they need from the academy trust.
- How the academy trust board or leadership may need to adjust once the school is in the academy trust.

[Contact your RSC's office or the ESFA](#) for further discussions about growth and planning.

3.4 Academy Trust Transfers and Mergers

MATs can grow by consolidating with other academy trusts. Small academy trusts can choose to merge together to form a bigger trust which can have a greater impact across the area.

Most academy trust transfers or mergers, involve the academies from one academy trust legally joining another, rather than establishing a new legal body with associated costs.

A new legal body is usually established when:

- A standalone academy trust transfers into a larger MAT.
- A smaller academy trust or academy trust with vulnerable schools joins a stronger academy trust.
- Two academy trusts of equal size or capacity want more of an equal merger.

A new legal body may involve consultations on:

- Vision.
- Name change.
- Changes to the academy trustees and leadership structures.

4. Additional Resources

In addition to this guidance, the following sources will be helpful:

- Guidance related to establishing and developing your trust [here](#).
- The '[Good Practice Guidance and Expectations for Growth](#)' guide.
- PAG's academy and free school services [here](#).