For Schools & Trusts

Joining a multi academy trust

A guide for maintained school governing boards

Updated November 2025

Guidance

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Contents

Introduction

A multi academy trust (MAT) is a single legal entity: one organisation overseen by a trust board that is accountable for all schools within the trust.

The previous Conservative governments set out a clear intention to move towards a fully trust-based system. While the central drive to make all schools part of a MAT has eased under the current Labour government, there remain several reasons why schools choose to join a MAT.

Before any formal steps can be taken, school leaders and those governing should make time to explore the options available and the drivers behind them. A successful journey begins with all involved in the leadership and governance of your school understanding how the changes will affect them and change their roles, as well as the benefits being sought. At the heart of any discussion should be the overall benefits for pupils and community the school serves. This means that conversations about joining a MAT should begin with a clear articulation of how the decision will improve the quality of education for pupils.

This guide aims to:

- give governors and school leaders an understanding of the MAT structure and its benefits
- cover the step-by-step process of joining a MAT

NGA has guidance on federations and research on collaboration models which your school may also wish to consider.

Single academy trusts (SATs)

Guidance on identifying and assessing potential partners is the same for SATs as for maintained schools. However, SATs interested in joining a MAT should also visit NGA's guidance on mergers for information on the legal process.

Schools with a religious character

Where a school designated with a religious character is looking to join a MAT, it should discuss the proposal with the body or person representing the religion or religious denomination at an early stage. For example, in the case of Church of England or Catholic schools, the school should liaise with the director of education (or their team) of the diocese in which the school is situated.

There will be differences in the process for joining a MAT for schools designated with a religious character. Each diocese has its own distinctive approach, requirements and preferences. Many dioceses have an academisation strategy (published on their websites) which aims to provide clarity to schools and trusts in their locality about how and why the diocese takes decisions around academisation and trust development. The relevant religious authority and regional director will be able to explain the process to be followed in each individual case and outline any additional consent requirements.

1. Why join a MAT?

There are likely to be several factors that influence a school's decision to join a MAT. Some are external policy drives from governments who often seek to implement a vision of a self-improving school system facilitated by trust capacity. While this idea has been the subject of debate over the years, the general direction shows schools academising and joining MATs, and today, 50% of all state schools are in a MAT.

With the rising number of academies, the trust sector has matured and developed, meaning the potential organisations to partner with have greater capacity and are subject to clearer regulation from the Department for Education (DfE). More on the evolution of the trust sector can be found in NGA's 2024 report, The Mature MAT Model.

Some of the benefits associated with schools collaborating in a formal group include:

- a framework for sharing knowledge and experience of all aspects of school improvement
- increased opportunities for staff development, progression and retention within the organisation
- access to established central services (such as school improvement and financial management) and opportunities
- the opportunity to enhance strategic governance by maximising roles within a multi-tiered governance structure
- sharing specialist staff, allowing schools and pupils to access a richer set of curricular and extra-curricular activities
- achieving economies of scale and financial efficiencies
- resource sharing as a result of trust-wide policies and practices

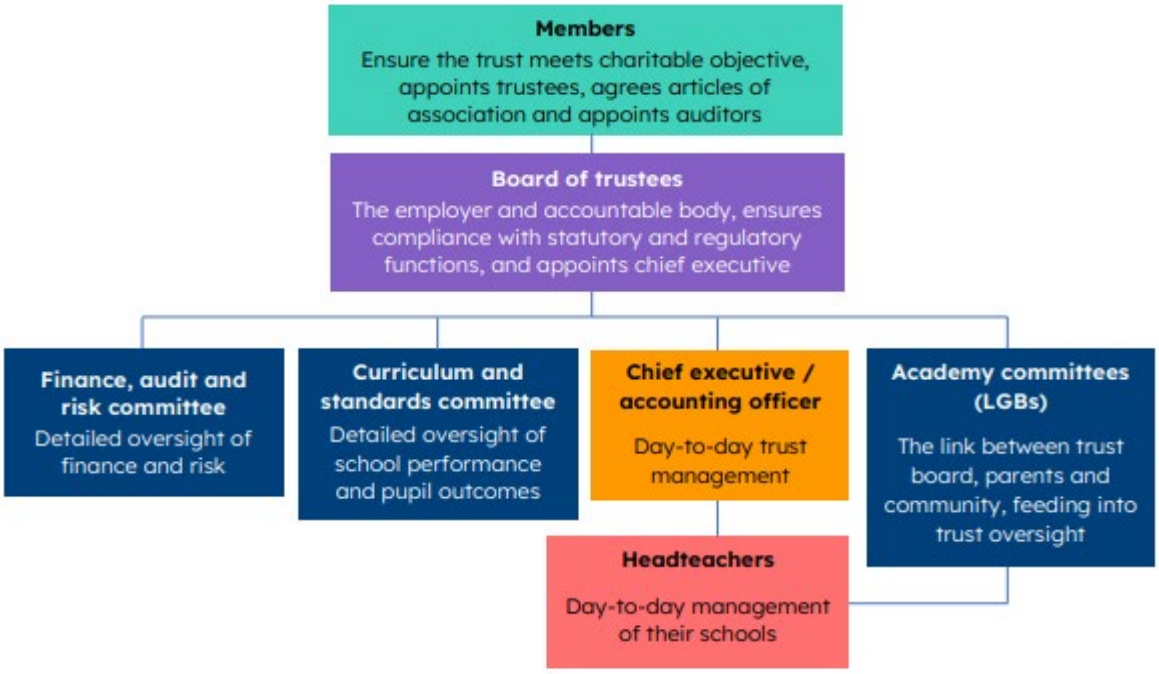
Academy orders

Joining a MAT requires conversion to academy status. Typically, it is the board and/or headteacher instigating these conversations.

However, some schools are issued an academy order which is a legal instruction that will ultimately lead to a maintained school academising and joining a MAT with a track record of school improvement. In most cases, an academy order is triggered by an Ofsted inspection judging a school as being in a 'category of concern'. More information can be found in our Ofsted guidance.

2. Understanding the MAT structure

Many of the benefits of joining a MAT are enabled by the organisation's multi-level structure.



The trust board is the overall responsible body of a MAT – setting the strategic vision, being the employer of all staff and holding leaders to account for the operations and performance of the organisation.

Members of the MAT ensure the trust is meeting its charitable objectives but have minimal involvement in running the trust. It is the trust board and its committees who carry out the everyday governance functions.

Local governance

The local tier (known as academy committees, local governing bodies or similar) plays a key role in equipping trust boards with school-level intelligence to strengthen decision-making. They reflect the needs of individual communities, enabling more strategic and robust governance. The structure and functions delegated to the local tier are determined by the trust board. Although the trust board can delegate certain functions and decision-making to the local tier, they cannot delegate overall accountability.

Governing boards of single schools joining a MAT are often invited to retain a role within the local tier. Early conversations with the MAT you are joining will ensure there is clarity on the roles and responsibilities of the new board.

All MATs must have a scheme of delegation which details the delegation of governance functions to the chief executive officer (CEO), the trust board's committees and the local tier. Each MAT will have a unique approach to delegation depending on school contexts, so reviewing this document will be a key part of the due diligence when you are identifying potential MATs to join.

Executive leadership

The trust board works closely with the CEO who is the most senior employee in the organisation. The CEO is supported by other members of staff who may include the chief financial officer (CFO), education directors, lead governance professional and head of HR. Together, these individuals are known as the 'central executive team', responsible for implementing the trust's strategic vision, as set by the board, and managing the distribution of resources across the trust.

While day-to-day management of the trust's schools is still undertaken by a headteacher, it is the CEO who is responsible for the operational delivery of education for all schools.

The size of a MAT usually determines the make-up of the central executive team. For example, some particularly large or geographically dispersed MATs have executive team members who oversee the educational performance of each school within a region or cluster and line manage the headteachers. In smaller trusts, the CEO usually works directly with individual headteachers.

3. Roles and responsibilities

Joining a MAT is a collaborative process that involves multiple stakeholders both internal and external to the school.

Governing board

The governing board will instigate the process of joining a MAT, oversee its progress and ultimately reach a final decision on whether to proceed. The board should carefully consider the advice of the headteacher, while understanding that any decision will directly affect their role. This means that any conflicts of interest must be carefully managed.

Headteacher

As the organisation's senior leader, the headteacher will provide vital advice to the board on the operational implications of the options being considered. They will also be accountable for carrying out the operational elements of the process, delegating where appropriate. This includes conducting due diligence, organising stakeholder engagement and sourcing external support.

External support

The process of joining a MAT can be complex, so many schools will seek external support to help them through the process. While support can be offered by the MAT in question, it is usually valuable for the school to have its own adviser who is independent of the trust they are potentially joining as it ensures objectivity and can offer an additional layer of confidence in proceedings. This role could be fulfilled by an NGA consultant.

In addition, schools will often contract specialist lawyers such as Browne Jacobson to handle the legal specifics of joining a MAT, from land transfers to HR implications. Schools and trusts are encouraged to discuss the best approach to receiving legal advice depending on their circumstances. Where all parties are committed to the desired outcome, lawyers retained by the acquiring trust usually provide the external legal support needed, which is a cost-effective option. However, there may be circumstances where some level of independent legal advice will be required or preferred by the respective parties. The stage of due diligence and/or negotiations you are in may inform this decision.

Regions Group

The DfE's Regions Group, led by regional directors, is responsible for taking decisions about the creation and growth of academy trusts. This includes deciding which trusts to commission to take on which schools based on a strategic assessment of the school, MAT and local area. This means that there is no guarantee a school will automatically join a MAT they have identified as suitable.

Having early conversations with the Regions Group will help in ascertaining if the application is likely to be approved. In practice, the MAT will undertake much of this correspondence.

For more information on how Regions Group take such decisions, see DfE's commissioning high quality trusts guidance.

4. Setting up a working group

We recommend that you establish a small group of interested governors and senior staff who have the time and skills to explore the options more fully. This group can:

- research and identify different options open to you, considering the pros and cons of these
- consult bodies with authority over your school, such as your LA and religious authority (where relevant)
- meet potential partners, to discuss whether they might be interested in partnering with you and, if appropriate, start to consider what a partnership might look like
- consider the financial and organisational structure of the school to determine whether it is ready to join and adapt to another organisation
- consult informally with key stakeholders, including staff, pupils, parents and the wider community, to explore their views on possible options

Some schools appoint an external project adviser or consultant who has previous experience of similar projects. This individual can support you from the point of establishing the working group or be brought in to assist in later stages such as conducting due diligence.

5. Identifying a MAT to join

It is essential that you take the time needed to ensure you choose the right MAT to join. We recommend that the governing board and headteacher begin with a detailed self-assessment of your school's:

- strengths and weaknesses
- goals
- reasons for joining a trust

Having honest conversations at this stage, rather than making assumptions, will help to avoid wasted time exploring a partnership that is unlikely to work.

What are your non-negotiables?

Consider the most important aspects of your school's character and culture on which you are not prepared to compromise:

- Are you set on retaining high levels of delegation for local governance, or would you be comfortable being part of a MAT with only advisory bodies at school level?
- How would you feel about changing the name of your school?
- Many MATs keep finance and HR centrally controlled – how do you feel about a centralised approach?
- Do you have a specific approach to teaching, learning and the curriculum which the MAT you are looking to join with must be compatible with?
- Are size, location and geography a particular consideration?
- Are there any policies you would want to retain at school level? Most MATs enable some policies to be locally developed (eg safeguarding) and keep others trust-wide (eg whistleblowing), while others exclusively operate with trust-wide policies.

Is there an obvious first choice?

Some schools will have a clear potential partner in mind when exploring joining a MAT. For example, a neighbouring school may be part of a MAT and encourage you to join, or a school that many of your pupils move to or come from may be part of a trust that presents potential benefits. In these situations, it is important to remain open and objective. Take time to explore all available options, seek advice where needed and avoid feeling pressured into making a decision before you have completed your due diligence.

If you have decided to join a MAT but are struggling to find a suitable trust, make enquiries directly with your regional director's office to discuss potential options.

For some schools with a religious character, you may be offered a selection of trusts to join, as it may be a requirement of your religious authority to join an established faith trust. In such cases, it is still worth considering whether joining that trust is the right decision for your school and you should raise any concerns with your religious authority.

Compatible culture, vision and ethos

A key consideration is whether the organisations you are looking at have compatible values, expectations and practices. A mismatch in organisational culture is a common pitfall in any partnership, so this element needs to be assessed both at this stage and later during due diligence. Ask yourself:

- Which aspects of your school's ethos and vision are non-negotiable?
- Which aspects could be adapted to align with a trust without negatively affecting the character of the school?

Trusts usually publish their vision on their website, but these statements can be broad, hard to disagree with and lacking in detail. It is therefore essential to find out how vision will translate into strategy and the operational impact this will have.

Spending time in and with the MAT you are looking to join provides an opportunity to experience culture and ethos firsthand. Informal discussions with individuals such as headteachers, trustees/local governors, the lead governance professional and members of the executive team are also a useful way to explore culture. The nature and extent of these interactions will vary based on the relationship that may or may not already exist between parties.

Looking at policies for how the trust manages key areas, such as performance management, curriculum, teaching and learning and behaviour, can also give a more concrete view of how ethos is lived. Other areas may include the MAT's attitude to stakeholders and local governance.

It is important to identify whether there is common ground before proceeding further. Specific points to consider include the trust's:

- goals for the next three to five years, including plans for growth
- approach to centralisation
- approach to the locality of schools, the role of community ethos and stakeholder engagement
- admissions policy and how this reflects the trust's approach to inclusion
- commitment to working with other trusts, schools and other bodies in a local area

Sources of information

Useful sources of information about potential partners include:

- DfE performance data and Ofsted reports (including any Ofsted MAT summary evaluations)
- the MAT's governance documents, including the articles of association, scheme of delegation and terms of reference
- trust and individual school websites
- annual reports and financial statements (some may be filed at Companies House)
- the minutes of trust and local board meetings
- information from talking to local governors, trustees, headteachers and other members of the leadership team
- the DfE's financial benchmarking and insights tool to compare finances at both school and MAT level
- staffing structures
- any media reports (to be treated with caution)

First conversations

Once you've narrowed down the number of trusts you're interested in joining, it is sensible to have an initial conversation with them to ascertain whether they would welcome your application. Most MATs have a plan for how (or even whether) they intend to grow, usually documented in a growth strategy. There is no rule on who should take part in these conversations, but school and trust chairs, senior executive leaders and business leaders can all bring important perspectives.

Not all MATs will be able to take on more schools. A MAT may need to first consolidate its financial position, have decided to focus on a particular geographic area, or lack the capacity to support schools with particular characteristics.

A chair or CEO will not be able to give you a definitive answer at this stage since the trust will need to carry out its due diligence; the final decision is also made by the regional director. However, the MAT should be able to give you an initial indication before you invest any more time and resources in pursuing the partnership.

Communicating with the board

Throughout this initial process, the working group should be offering regular updates to the governing board on the options explored and the progress of potential partnerships. Many boards choose to have this as a standing agenda item. The board should scrutinise the approach taken by the working group. Some questions to ask include:

- How well is the scoping strategy going?
- Are we only approaching one 'type' of MAT?
- Have any MATs identified concerns and/or risks with our school?
- Have we drawn on external expertise?
- Is the school still in a position to join a MAT? If not, what's changed?

Feeding back to the board also ensures conversations are minuted and remain transparent for other stakeholders who may be interested in the preliminary discussions of joining a MAT.

6. Conducting due diligence

Due diligence is the process of investigating an organisation and establishing facts and details prior to entering into a contract with it. It shouldn't just be focused on compliance; all parties should have confidence in the merits of their organisations working together in the long term.

Due diligence is undertaken to:

- obtain sufficient information about the trust to decide whether to proceed
- allow a trust to look into your school in more depth to confirm whether they would like your school to join them
- identify the assets that will be transferred
- identify and evaluate any potential risks and liabilities at an early stage and use the information revealed to address any issues or concerns

Fundamentally, the due diligence undertaken should assure all parties that they are taking a decision in the best interests of their organisation and the pupils and community it serves.

Seek external support at this point (if you have not done so already). Due diligence can be a complex process that demands significant time and resources. It is also a crucial aspect before any decisions can be made, therefore, the process should be given adequate time and attention.

The DfE provides best practice guidance on due diligence.

When to start due diligence

Schools should engage in some level of due diligence before committing to the academisation process. It should then be ongoing until the legal process is complete.

Who carries out due diligence?

Due diligence is usually planned and coordinated by the working group, consisting of governors and senior members of staff including the headteacher.

Ordinarily, it is a MAT bringing a school into their trust that carries most of the risk as they will be acquiring the school's assets and liabilities. As the MAT will also have the most internal capacity and experience in this area, it will likely initiate the process and complete the bulk of the activity. However, this is still a major decision for your school, so it is vital to conduct sufficient due diligence to reassure the board that it is making the right decision.

The process involves both internal personnel (finance director, business manager, estates officer, HR director and IT staff) and external advisers (legal and accounting services, building surveyors and insurance providers).

How to conduct due diligence

The level of due diligence undertaken will be dependent on individual circumstances; it should be proportionate to the potential risks identified. Due diligence shouldn't just be a desktop exercise. The working group should visit the schools involved to see if practice matches what the paperwork states.

Before sharing any confidential data, a formal agreement should be put in place to ensure the recipients of such data are bound by contractual obligations to keep it confidential. Your legal support will be able to help you in devising an agreement.

Which areas are scrutinised?

Due diligence normally falls within one of six main headings. Examples of areas include:

Educational performance	Finance	Organisational
• curriculum design • performance against key accountability measures • awareness of any performance challenges and confidence to provide support	• historic and future budget forecasts • management accounts and monitoring reports • reserves (size as well as the trust's policy) • approach to central and academy-level funding	• staffing structures • existing contracts, providers and end dates • measures as part of the TUPE (transferring staff) process

Leadership & governance	Legal & commercial	Size, capacity & geography
• track record of executive leadership in the MAT • leadership succession plan • existing governance structure and commitment to local governance • clear and comprehensive scheme of delegation • skills, diversity and experience of trust board • minutes and papers from previous meetings	• PFI contracts (a trust may not want to take on liability) • insurance cover, public liability and related claims • outcomes of external reviews and audits • land and buildings (complexities can arise over ownership and boundaries)	• the number of schools in the MAT and geographic spread • growth strategy and restrictions • previous growth experiences and rebrokering activity • regional support offered to geographically isolated schools

Due diligence reporting

We recommend that the working group agree milestones for reporting back to the board, with the most important areas prioritised. This ensures that if a critical area of due diligence, for example, financial management, does not meet the board's expectations, the board can make an informed decision about whether to stop the process altogether.

Once due diligence is complete, the working group collates the findings into a single report with recommendations to inform the board of their decision-making process.

7. Consulting with stakeholders

Formal consultation must be carried out as part of the official process of joining a MAT, however, key stakeholders should already know your plans and have had a chance to discuss them.

The responses will need to be considered at a governing board meeting and properly minuted.

Remember, **schools designated with a religious character** should discuss the proposal with the body or person representing the religion or religious denomination at an early stage so that their views and requirements can be considered in any final proposal.

When to consult

The consultation process will need to be completed before you sign your academy funding agreement. The law does not impose a minimum length of time to consult, but there needs to be reasonable opportunity for relevant parties to respond. Your context will impact on the consultation timeline so your legal advisor will be able to offer you guidance.

How to consult

Consider when to discuss your plans with stakeholders, and how you will invite them to share their thoughts. For example, you could do this through:

- discussions at a staff meeting
- early engagement with relevant trade unions
- a letter to parents, also included on the school website, with responses invited
- question-and-answer sessions for parents
- a discussion with pupils in assembly, class groups or tutor groups
- an article in a community newsletter (after key stakeholders have been consulted)

Whichever options are utilised, the school will ultimately need to carry out a formal consultation on its proposals. Legal guidelines on consultations in the public sector state that:

- they should be undertaken when proposals are at a formative stage
- they should provide enough information to those consulted to enable them to comment intelligently on the proposals
- they should allow enough time for those consulted to properly consider the proposals
- consultation responses should be specifically considered by the decision-maker when deciding whether or not to implement the proposal

Many schools will choose to consult and provide relevant information to stakeholders via the school website. In addition, you may wish to send letters to the parents of pupils, briefly outlining the proposal. We also recommend that meetings are held with school staff.

What information to include

It is acceptable for consultation letters and other communications to set out the governing board's preferences in relation to conversion , for example, if a maintained school has already decided it wishes to join a particular MAT.

The school may also wish to set out what it regards as the advantages of joining a MAT but should ensure the communication is objective, balancing it with any potential drawbacks or risks. Some schools choose to upload an academy FAQs document on their website.

As a minimum, we would expect the following points to be addressed in any correspondence issued during the consultation stage:

- Your school's rationale for academising.
- The impact on pupils, staff and other key stakeholders.
- How and when a decision will be made.
- How the MAT's governance arrangements will work.

It should also be explained to everybody that the decision belongs to the governing board, after having consulted widely.

8. Completing the legal process

Maintained schools need to begin the process of conversion by applying online. Foundation or voluntary schools that have a foundation may only apply with the consent of the trustees of the school and the person(s) by whom the foundation governors are appointed. The DfE will then appoint a nominated project lead to contact you and provide support through the process of gaining consent, converting to academy status and joining the MAT.

The DfE has produced a comprehensive guide on converting to academy status, which explains what is involved in this part of the process. Many MATs are experienced in supporting schools through this process and may take on much of the bureaucratic burden themselves.

The school's governing board will need to give final approval. The board can change its mind right up to the point when documents are sent to the Secretary of State for signature, which is usually around three weeks before the planned conversion date. Once the board has decided to move ahead with joining a MAT, the legal process can begin.

Transfer of staff

Joining a MAT will involve the transfer of staff to the employment of the trust by way of the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE). There are significant financial and reputational penalties if this is breached so it is essential to ensure that the process is carried out correctly. Staff can be reassured by being kept informed of progress (including if there is none) and having an open door for questions throughout the process.

Transfer of land and buildings

The school's land and buildings will need to be formally transferred to the MAT, often via a long-term lease. This will often involve the LA, as it will usually own at least some of the school land and buildings in most maintained schools. If your school has a PFI contract, this will add significant complexity that should not be underestimated. For schools with a religious designation, the school land may be owned by foundation trustees and/or by the diocese and it is usual for the trust to be granted a licence to occupy this land under an agreement known as the 'church supplemental agreement'.

Transfer of funds and final accounts

The school will need to transfer its final funds to the trust it is joining and produce a final set of audited accounts. This can be a source of disagreement if the LA, regional director and academy trust disagree on who is taking on particular debts, assets or liabilities. The DfE has published guidance on handling surplus and deficit balances, and it may require detailed conversations with your regional director.

This is often the area that causes delay – there may be negotiation with the regional director and the DfE if the school is not working with a balanced budget and/or has a significant deficit.

9. Integration

The success of joining a MAT will be determined by how effectively the school is integrated into the organisation. This phase will take the most time and will include the integration of governance, management, staff and systems.

Key elements of successful integration include:

Embedding the new governance structure

The MAT will have one trust board. The school that has joined the MAT should have an academy committee (local governing body), whose powers are set out in the trust's scheme of delegation.

Each academy committee will need to quickly understand its new remit, procedural rules and membership. There may be a significant overlap in academy committee membership with the governing board of the maintained school. As such, it is important that these individuals understand how their governance role has changed after joining a MAT.

For the trust board, the addition of a new school might require a re-evaluation of its governance structure. As a trust grows, the balance between what can be handled by the full trust board, and what needs to be delegated to the local tier or other committees will change.

Values, ethos and strategy

A MAT is one organisation with a singular vision and ethos. Care should be taken to consider how this can be extended and applied to each new school in the MAT. Bringing the school on board while continuing to value that school's specific identity is key. This is a balancing act which can be made easier by engaging with key stakeholders.

In MATs that contain faith and non-faith schools, plans to advance and safeguard the distinctive individual ethos of each schools' religious or non-religious character will need to be considered. The religious body in question would usually have an agreement in place with the MAT that guides many of the decisions that aim to protect a school's religious distinctiveness.

The principles of formulating a vision and strategy are further explored in NGA's Being Strategic guidance.

Senior leadership team

The school staff most affected by joining a MAT will be the senior leadership team. They will transition from leading a standalone organisation to being responsible for a single school within a larger organisation. Your headteacher will now be line managed by the CEO (or relevant education director in the largest trusts) rather than a governing board.

To manage this transition, it is essential that all parties understand their new roles. The trust will need to be clear about what functions are carried out by the trust's central team rather than by employees at a school level.

It is vital to engage with your staff as the school is integrating into the MAT, to understand what is working and what is not. For the individuals involved, this will amount to a major upheaval, so it is important to be sensitive to their feelings and aware that teething issues are likely.

Building trust

Clear and consistent communication with stakeholders is essential throughout the process of joining a MAT; it should extend beyond formal consultation, through the integration phase and beyond.

Those most invested in either organisation should be able to relate to the purpose and goals of the trust. Setting these out from the start will support stronger engagement and smoother transition.

The focus should be on delivering long-term public benefit and communicating about this purpose internally and externally. It may be difficult to achieve buy-in if communication narrowly focuses on advantages through financial gain and economies of scale.

A culture of transparency underpins the most successful conversion journeys. Leaders should recognise that joining a new organisation can be unsettling, particularly for those involved in school level leadership. The trust board and CEO should anticipate this and implement strategies to address concerns, build confidence and ensure a positive integration experience.