**EXAMPLE DUE DILIGENCE GRID**

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| XXX MAT | XXXX MAT | XXXXX MAT |
| **Positives:**  Primary Schools Only  Known school  Local area  Interested schools will have a say in shaping MAT  Retain autonomy  Try to maintain one head/one school  Appoint own staff  Church School status respected  Schools have a say on ‘non-negotiables’  experience  Similar schools with Good/Outstanding Ofsteds  Should lead to closer working relationships with the XXXX | **Positives:**  Promoting a collaborative approach with equal status for all schools  Hub model of working  Church schools already within the Trust  Retain own Head and local governing body  Build on established cluster links  Geographical locality  Common Secondary School  3-19 learning pathway  Attractive to new families/parents-may help secure the future of the school  Similar schools with Good/Outstanding Ofsteds  3% top-slice as things stand  Flat structure promoted  Light touch approach  Teaching School Status  Clear focus on CPD  Positive impression of key leaders  In a position to shape the structure/systems  Feedback The Trust approach is ‘hands-off’ at the moment  Buying in experienced people  Positive feedback about CEO | **Positives:**  Clear structure Experienced and established  Strong service team and model  Good track record of moving RI schools to Good  Other schools locally have joined  Very clear systems across the schools-enabling greater benchmarking and cross-school analysis/support (reports to governors/policies)  Tight focus on school improvement with rigorous monitoring (this presents challenges too). Performance issues will be picked up  Values based ethos  Feedback from other Heads has been positive & Feedback from admin teams has been positive and the word ‘supportive used regularly  Opportunities to work across LAs  Anecdotal feedback positive e.g. the MAT treats them as ‘their’ schools and has a supportive and move forward together outlook  One school feels they have lost some autonomy but in the right areas  The Trust have bought in a national educational provider to do school reviews when they are expecting Ofsted  Their size appears to enable them to bring in high quality people  Responsive-when schools are in need, additional support is given  One school felt like the Trust serves them well  Schools feel like the monitoring is done ‘with’ schools rather than ‘to’  One school said that their safeguarding has improved as a result of Safeguarding support  CEO/COO very experienced  Coordinated approach to subject leader networks. Wide range of CPD opportunities (deputies to head programme)  Staff in one school say that they have not seen much difference apart from rigour in monitoring  Feedback is that the key staff are genuine and fair  Central analysis of data |
| XXX MAT | XXXX TRUST | XXXXX MAT |
| **Concerns:**  Trustees appear to be already identified from  Leadership roles already appear identified  Sustainability-not sure how many schools will go in | **Concerns:**  Lack of clarity about what we are signing up for  Lack of high quality cross-school work in past  Volume of work involved in establishing a new MAT  Would probably be a more complex transition than with XXX MAT which already has systems/processes established  Admissions may be complex and leave us in a similar position  It is not clear how many other primaries are joining so how sustainable will a hub model be  Difficult to know how easily we would fit in with the other schools - not schools we have worked with closely in the past  Some unknowns-how will it change if xxxx school joins?  Probably a longer journey, potentially some sticking points, will it take more leadership and governor time? | **Concerns:**  Geographically it is more diverse in terms of geography and catchment and not necessarily with schools we have worked closely with in the past  It might be that the agenda for development/ improvement is set for us-we may lose some autonomy  Staff morale?-three weekly visits seems intense  Feedback is it can feel a bit 'big brother-ish' in that it is all set out and robustly followed up that you are 'on it' as a school  You do have to change your logo on paperwork/ uniform  5% top-slice  No choice over certain things-e.g. Assessment system (quote for us was £XXX annual cost)  Questions around where the meetings are held. |

**Concerns for all options:** New office systems including Finance New accounting year The complexities of the conversion Increased pension contributions due to Pension fund shortfall Losing our autonomy