



October 2023

**Planned merger of Alban Academies Trust and Atlas Multi-Academy Trust**  
*Information paper from Alan Gray (CEO AAT) and Margaret Chapman (CEO ATLAS)*

Dear Families,

This paper provides information on plans to bring our two, successful multi-academy trusts together. It outlines why we feel this is a positive move and the increased benefits such a merger provides to all young people and adults who attend schools in our two Trusts.

This is an exciting time for us as we continue our drive to provide the very best educational provision for everyone in our care.

### **Background**

Atlas Multi-Academy Trust and Alban Academies Trust are geographically close to each other and currently serve schools in Hertfordshire. Both Trusts were established 5 years ago and contain both primary and secondary schools. The schools serve broadly similar socio-economic areas and there is a lot of synergy between the two trusts in this respect. The two lead schools, STAGS (Atlas Multi-Academy Trust) and Sandringham (Alban Academies Trust) are very well-established and have a long tradition of supporting schools within Hertfordshire and beyond.

### **Why is a merger being considered?**

The two CEO's have been discussing this, alongside Trustee working groups.

Reasons for considering a merger include:

- A merger would establish a new, larger and stronger trust with increased capacity to continue school improvement and manage further growth. This remains a clear directive from the DfE and their vision for system delivery
- There is a close alignment of vision and values of both trusts allowing a smooth transition
- They are very close geographically
- Both are cross-phase in nature (a mix of primary and secondary schools)
- The range of schools and support work provided is broadly similar
- Admin infra structure is partly established and in development stage in each trust
- Staff in the two lead schools are well-known to each other and already work closely in other networks

### **What are the benefits of merging?**

- Strategic school improvement is at the heart of both trusts. Each trust has specific expertise, and a merger would provide increased capacity for school improvement and widen scope of work with an increased pool of staff to carry out school improvement work
- Staffing expertise, shared at all levels will strengthen strategic leadership and rapidly enhance positive outcomes within the trust and beyond
- Both current trusts would benefit from working with a wider range of colleagues, enhancing professional development opportunities and strengthening recruitment and retention of high-quality staff
- Members and Trustees expertise would widen and provide the opportunity to build on existing governance skills
- Financial planning and greater economies of scale will ensure long term benefits to Trust growth and school improvement by making scarce resources go further
- The two lead schools are 'capacity givers' within the system; by merging this would further enhance school improvement with existing schools and increased ability for growth over time

- The DfE improvement journey through larger multi-academy trusts continues with a mandate to further drive standards and effect change. The merger would respond well to this mandate building on existing expertise
- A larger trust provides more options for the future; for example, behaviour lead hub opportunities

**Why consider merging now and what is the proposed timescale?**

There is never a perfect time for any change. As professionals, we closely monitor the education landscape and identify any strategic changes following an assessment of opportunities. We feel that now is the right time to grow together, there is a continuing momentum towards academisation, and this will allow to us to better control future growth within the system. It will also place the new Trust as a major educational influencer in Hertfordshire, leading rather than following.

We anticipate that the process would take 8 – 12 months from now (September 2024). This provides time for trustees to complete their discussions on the opportunity this presents, and for senior staff to prepare an application to the Regional Director.

**What would the leadership of the emerging Multi-Academy Trust look like?**

We are proposing a CEO and co-CEO model built from the two existing CEOs. Agreement would be reached on specific responsibilities linked to each role, however the philosophy would be that all key decisions are made jointly and built on the experience and expertise of the two leaders.

The remaining structure is something that will be considered by drawing on the expertise of existing personnel.

**Implications for children in our schools**

The merger will not interfere with the educational provision in any of our schools, if anything, it will further enhance what we currently do. There will be no changes to senior leadership and your relationships with your school will continue as normal. The staff, including senior staff will continue to teach as they currently do. There will be improvements to the way we support teaching, for example in the capacity to provide human resources, information technology and finance. There will also be enhanced opportunities for developing the condition of our buildings to provide first-class facilities for everyone.

**Next steps**

Our two Trust boards spent time considering this proposal in the summer term and held meetings in the autumn to consider the matter further. Both Trust Boards have passed resolutions to proceed with the merger, subject to due diligence and the approval of the Regional Director. The next part of the process is to formally apply to the Regional Director’s Office for permission to bring the two trusts together. We will also build a new trust board from existing trustees and begin the process of preparing everything ready for the merger.

The new multi-academy trust will consist of ten schools, five primary and five secondary. The Trust will have a new name, to signify the heritage we bring together and reinforce that this is a friendly merger of two equals to further strengthen what we can do for education in our area.

This process should allow the new multi-academy trust to open in September 2024.

We look forward to continuing to improve the educational provision for all our schools and working with you all in the future.

We have also provided an FAQ section to further help you understand our plans. If there is anything further you would like to know, please contact the AAT or ATLAS, as appropriate and we will help you.

Yours sincerely,



Margaret Chapman  
(CEO Atlas Multi-Academy Trust)



Alan Gray  
(CEO Alban Academies Trust)



## Frequently Asked Questions (FAQs)

### **Which schools will be in the new multi-academy trust?**

The existing schools will move into the new trust, these are: Beech Hyde, Garden Fields, Skyswood, Wheatfields Infants' and Nursery, Wheatfields Junior, Adehyfield Academy, Ridgeway Academy, Sandringham, STAGS and Verulam Schools.

### **What will be the name of the new trust?**

The Alban and Atlas Education Trust.

This name draws from elements of both merging trusts, reflects the overarching ambition to achieve a trust merger of equals to create a stronger merged entity.

### **What benefit is there to the two Trusts in merging?**

The schools in our Trusts have served the community of Hertfordshire and its surrounding areas for very many years. We have a firm commitment to providing the highest levels of care and academic achievement for all our children and young people, irrespective of their starting points. A set of shared values lead to the foundation of both Trusts. We work with likeminded people following a common core vision. Both Trusts grew from close partnership working and we believe that a commonality of belief in the power of high quality education and the growth of the children and young people within our schools means that the impact of a bigger Trust, with its associated resource, would bring about improvements in all our schools.

Trustees have studied the medium term financial situation and believe combining both MATs would ensure long term sustainability of all the schools. We also believe increased partnership working and greater shared buying power would benefit all of our schools whilst allowing each to retain their own unique ethos within our own community. Our ambition is that all of our schools would benefit from shared networks and forums and systems as well as building on existing strong working relationships.

### **How would the governance arrangements work?**

Currently each Trust has a Board of Trustees. This structure would change and there would be one Trust board across the newly merged Alban and ATLAS Trust with individual local governing bodies (LGBs) for each school. The newly formed Trust Board would be made up of skilled individuals and would comprise of existing Trustees from both Trusts. As now, each school has its own LGB with delegated responsibilities from the Trust Board. There would be no change to LGB arrangements.

### **Financial implications**

Each Trust is currently financially secure and has its own reserve. Budget setting is always carried out well in advance so that any changes which need to be made can be implemented in good time to seek to achieve a balanced budget for every school. Budget monitoring continues throughout the year by the Trust Board, with monthly update reports. If a school in the Trust is projecting an in-year deficit the Trust Board would work with the school to look at cost savings and if appropriate may permit an in year deficit provided there was a financial recovery plan and the central reserve could allow this. This could result in financial delegation being limited under the scheme of delegation if this was not an agreed position so that Trustees have even more oversight of the position. The budget for each school is determined by the number of pupils and socio-economic factors. This allocation of funding does not change in a Trust, but larger Trusts do gain economies of scale when purchasing contracts and other items.

### **How would catering and other contracts work in new Trust?**

Current catering and all other contracts would continue to run.

### **How would finance work in the Trust?**

Each school's budget is based on the number of pupils known as the Age Weighted Pupil Unit (AWPU). This would not change. An additional fund will now be accessible to all schools known as the School Condition Allocation (CSA) due to the number of pupils in the Trust.

### **What are plans for future growth?**

The Trust is always open to discussions with other local schools if they wish to formalise partnership working for the benefit of all pupils. Each opportunity would be considered fully before any decisions were made. Most importantly each school within the Trust retains its own identity, serving the community in which it is located.

### **What happens if a school in the MAT has a dip in standards?**

The purpose of a Trust is to provide educational support and increased capacity. The oversight from the Trust Board would mean that the trust would know about possible concerns at an early stage and prevent this becoming significant through interventions and increased support. However, if this happened, we would draw on existing capacity in the trust and where necessary external consultants.

The benefit of an expanded Trust would be the additional resource we were able to provide for school improvement. The great strength of the teaching in the schools within the Trust mean that we have a great basis to learn from each other and adapt practice in line with what is evidence based best practice.

### **Does Ofsted consider each school on an individual basis or inspect the MAT as a whole?**

Ofsted considers each school on an individual basis currently, but they would look at the Trust board as the accountable body for any individual school.

### **Would admissions arrangements change?**

No, there would be no changes to the current admission arrangements.

### **Would there be any changes to already existing Post 16 consortium arrangements?**

No. The current consortium arrangements in Sandringham School with BSV are very well established and will not change. Similarly, STAGS works very effectively within ALPS consortium of schools in St Albans and this arrangement will not change as a result of this merger.

### **What would happen to the uniform?**

We do not propose to make any changes to the current school uniforms of any of our schools.

### **Would the names of the schools change?**

We do not intend to change the name of any school and we are strongly committed to retaining the identity of each school within the AAET.

### **Would the times of the school day and holidays change?**

We have no plans to change the times of the school day or the term dates. Any future changes would be subject to extensive consultation with parents/carers.

### **What happens next, what is the timescale of any change?**

Trustees would need to consider any feedback and extensive due diligence. Trustees will apply for permission to the Regional Schools Commissioner (part of the Department for Education) to formally proceed and if that is granted, lawyers would need to carry out the legal work so the schools and staff can transfer into AAET.

Staff and parents would be updated at each stage and staff from the two Trusts would be part of a separate consultation process under the TUPE regulations which is more specific and would give them a further opportunity to ask questions and understand how, if at all, their role would be affected. The earliest this is likely to be able to be implemented is September 2024.