

# Governing in a multi academy trust

## Trust governance in 2022



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[www.nga.org.uk/governance2022](http://www.nga.org.uk/governance2022)

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# Foreword

Over half of pupils in England are educated in academies, but because of the different governance structure, under half of volunteers involved in school governance (43%) govern in academy trusts. The vast majority of those (86%) are within multi academy trusts (MATs). Of the estimated 92 thousand volunteers governing in MATs, 12 thousand are trustees and 80 thousand are local governors at academy level.

NGA would like to say thank you for the vital work you do ensuring pupils, staff and senior leadership can achieve and thrive in our schools. This important role often goes unrecognised, but not by NGA.

This year's survey was conducted shortly after the release of Opportunity for all, the first schools white paper since 2016, which focused on building a schools system in England based on strong MATs. The Government's vision is to create a "stronger and fairer" system by making it fully MAT based by 2030, with all schools at least on their way to becoming part of a trust by then. I write this just days before the country has a new Prime Minister and presumably also a new Secretary of State for education. Even though the Schools Bill taking forward some of the white paper's measures has had a very tough time in the House of Lords last term, we assume that this vision remains.

The responsibility trusts carry in running state schools makes them part of a crucial public service, funded by public money and overseen by their board of trustees. It is important to remember, as demonstrated by our survey respondents, that trusts are not a uniform sector; they are diverse in many ways, including size, ethos, and between MATs their geographic spread and how much control they retain at their centre.

The big difference in governing a MAT – as opposed to a single academy trust (SAT) – is in knowing how much the trustees and the executive should delegate to academy level and how much the board of trustees must see and decide for themselves. The white paper refers to the important role of the local tier of governance.

This survey shows almost all MATs include a local tier in their governance structure and remain committed to it. This is an important finding, as some have downplayed its importance over the years, leading some quarters to the unfounded conclusion that the local tier was a disposable part of the

MAT system. Our findings show this couldn't be further from the truth. Local governance helps to ensure stakeholder voices are heard, but it is more than a stakeholder consultation forum as this report reveals. The challenge is no longer making the case for local governance but ensuring that it is meaningful and effective.

The second report in this series captures the reduction in size of boards over the past decade, but otherwise innovation which some had hoped for has not triumphed. More than nine in ten MATs have returned to the tried and tested model of one committee per academy and another six per cent have committees which cover more than one school. This should not be seen as a failure but a system reaching the next state of its maturity and improving its understanding of effective governance.

The white paper promoted the importance of parent and community engagement. It was disappointing to see that this year, the number of respondents who felt that their MAT effectively engaged with parents and the wider school community dipped to just over half (55%). There is still significant work to do to convince even all those involved in governance that this is working well, let alone parents themselves, who still often have no concept of the trust which remains distant to them, sometimes literally.

On the other hand, almost three in four of those governing at academy level (73%) were positive about their MAT and how their voices were heard by their trustees, continuing an improving trend over the past few years. While progress overall with communication between governance layers – trust members; trustees and local governors – is slower than we



would hope for, it is pleasing to see that there has once again been a significant increase in the trend of separation between those serving on the different tiers within MAT governance structures – something NGA has advocated for many years.

The survey results show an interesting picture of the general willingness of SATs and maintained schools to consider joining or forming a trust from those not yet part of one. The appetite is increasing, but slowly. Despite the evidence paper published alongside the white paper, there is still much work to do to convince many of our respondents that this is indeed the right way forward for the future of their school and pupils. During the last year, those of you who are yet to take this route have given us your reasons why:

- A very clear and continuing attachment to locality and the importance of local collaboration.
- A fear of being ‘taken over’ by a larger organisation that will not have the interests of ‘their’ school and the needs of their community at the heart of their decision-making in the way the current board does.
- The need for more conclusive evidence on the benefits to their pupils and how these are only provided by a MAT structure rather than local partnerships.
- The loss of school autonomy and the inability to re-consider the decision to join a MAT or to change trusts should promises not be kept and outcomes not appear.
- The lack of control over school finance and the potential loss of reserves.
- Given all the other pressures faced by schools and their communities, leadership capacity is already stretched and structural change is not the best use of their time at present.

NGA was an early adopter of the benefits of families of schools, although it is the school’s governing board that is in the best place to judge what is in the best interests of their community. In 2015 we published the first edition of guidance with The Association of School and College Leaders (ASCL) and Browne Jacobson on joining or forming a MAT and the third edition in the 2022 summer term.

One piece of evidence this survey confirms is that MATs appear to be in a more comfortable position than other school structures in terms of balancing the budget. However, they are not immune in terms of worries about future financial considerations, with more MATs increasingly negative on the financial sustainability to achieve long-term goals. Since the survey was conducted last term, the concerns about immediate rising costs are almost universal. We say more about finances in the third report in the series.

The white paper suggested trusts will need to grow to ten schools or 7500 pupils; however the survey shows it is trusts already bigger than ten schools which are more likely to grow. The DfE will need to be more proactive in supporting the growth of smaller trusts if the vision is to be achieved.

This year’s survey provides an in-depth perspective of these views, experiences, opinions and perceptions at a crucial time for shaping the future of the schools system. MATs have now been around for many years, and we know from NGA’s extensive work what strong strategic trust governance looks like. This has been the bedrock of the DfE’s successfully reformed National Leaders of Governance programme and we look forward to this being embedded in the DfE’s strong trust definition. In some trusts governance is now working extremely well, but we can’t claim this to be universal. Not every trust has commissioned an external review of governance, as recommended in the Academy Trust Handbook.

We hope you find this report’s findings as informative and intriguing as we do. Thank you to all who contributed to the crucial intelligence that this year’s survey provides at a key point of change for the school system. Without your generosity, NGA would not have been able to document the evolution of the MAT governance over the past 12 years. The process of arriving at the right approaches for schools and trusts will continue to be refined, and your views and experiences help us and the wider sector to shape them.



**Emma Knights OBE**  
Chief Executive  
National Governance Association



# Introduction

The role of multi academy trusts (MATs) in the education system has developed at a rapid pace during the last decade. 2022 has delivered a renewed and strengthened focus on the future of MATs with the arrival of the long-awaited schools white paper, Opportunity for All.

The accompanying progress of the Schools Bill and a regulatory and commissioning review has signalled the government's shifting of gears in its quest to achieve a fully trust based system. But while the white paper sets out that ambition – for all children to be taught in a family of schools, with their school part of a strong multi-academy trust by 2030 – the sector today is still very much constructed of two halves.

This is the twelfth consecutive year that NGA has conducted the school and trust governance survey, providing an extensive overview of the governance of state funded schools in England. This longitudinal national data documents the evolution of governance which otherwise would have been missing.

Today, 46% of state-funded schools in England are academies (including free schools, studio schools and university technical colleges). This includes 80% of secondary schools, 39% of primary schools, 43% of special schools and 47% of alternative provisions. This means that 57% of pupils studying in state funded schools in England are educated in academies and free schools. 87% of academies are now part of a MAT of two or more schools.

This report focuses on the experiences and practice of those governing in MAT settings: respondents include MAT trustees and those who govern on local academy committees, often referred to as a local governing body (LGB). The survey has also captured the views of MAT CEO's. As such, it provides a unique view of the realities of the MAT system, from those leading and governing MATs, at a significant point in the MAT system's history.

As the survey is anonymous, we do not know whether respondents are at the same trusts as each other. MAT and academy committee respondents were asked about governance issues including trust board practice, communication between layers of governance, local governance, perceptions of being in a MAT, and views on MAT finance and growth.

## Methodology

This report is one in a series of three reports detailing the findings from 2022's survey. It is open to everyone governing at state funded schools, whether as trustees of academy trusts or governors of single schools. Respondents cover all school phases, types and regions.

While not all respondents answered every question, this survey provides detailed insight into the demographic, views and experience of England's largest volunteer force. The survey was open to all governors, trustees and academy committee members between 25 April 2022 and 30 May 2022 via the online survey website SmartSurvey. In total, 4,185 respondents engaged with the survey.

For a full overview of the methodology used:

► Visit [www.nga.org.uk/governance2022](http://www.nga.org.uk/governance2022)

## School and trust governance 2022

### In this series:

- Governing in a multi academy trust
- Governance volunteers and practice
- The priorities and challenges facing our schools

Find the full series of school and trust governance in 2022 reports at:

[www.nga.org.uk/governance2022](http://www.nga.org.uk/governance2022)





# Key findings

- 01 NGA's longitudinal data reveals a significant commitment to local governance among trusts that is increasing over time.** In 2022, 90% of respondents agreed that their trust board is committed to ongoing local governance arrangements – only 3% did not agree.

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- 02 Almost all of MATs remain committed to a tried and tested model of local governance and a push for more innovative approaches have not materialised at scale.** 91% of respondents have arrangements for each school, compared to 84% in 2017. 6% have committees covering more than one school.

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- 03 The local tier has varying roles but monitoring pupil outcomes is the most delegated function.** The top roles for the local tier include monitoring outcomes for pupils (95%), engaging with stakeholders (93%), and advocating for the school in the local community (84%). The least common roles carried out by the local tier are monitoring financial management (26%), performance management/appraisal of the headteacher (25%), and monitoring compliance with legal duties and trust policies (19%).

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- 04 A decreasing number of respondents felt that their MAT is effectively engaged with parents and the wider school community.** Only 55% agree this year compared to 62% in 2021 and 64% in 2020. This bucks a trend set in the last two years on increased levels of engagement because of the pandemic.

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- 05 There is a continued positive trend of schools recognising the value being part of a MAT brings.** 77% of those governing at academy level said the MAT adds value to the work of the school, rising from 69% in 2021, and up from 64% when this question was first asked in 2017. Larger trusts were most likely to agree (81% of trusts with 21 or more academies).

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- 06 While MATs are better placed than any other school type or structure in terms of balancing the budget, they are increasingly negative about the long term.** MATs are better placed than any other school type or structure in terms of balancing the budget. While 29% of MATs said they were able to balance income and expenditure, retaining a healthy surplus, they are increasingly negative about the long term, feeling that they do not have sufficient funding for their vision and strategy and their confidence in the future is starting to weaken.

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- 07 The appetite for joining a trust is increasing but at a subdued rate overall.** While the number of maintained schools and single academy trusts deciding to join or form a trust has nearly doubled since 2020 – the overall percentage of schools actively pursuing this remains small, with just 11% deciding to join a MAT in the last year (up from 6% in 2020). 17% have considered it but decided against it while 43% have not considered it at all.

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- 08 Single academy trusts (SATs) are more likely to consider joining or forming a MAT.** 35% of SATs want to join or form a MAT, compared to 14% of maintained schools. A quarter of SATs have considered this option but have decided against it.

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- 09 MAT growth over the past year has been dominated by larger trusts.** Medium to larger MATs have seen significant growth – only 21% of MATs varying from 11 to 31 plus schools said they hadn't grown in the last year, compared with 56% of MATs with 2-10 schools.

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- 10 The factors influencing future growth continue to shift.** Economies of scale (58%) has jumped from just 30% in 2021, meaning it is now second only to growth forming part of the trust's strategy (59%).

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- 11 The schools white paper, Opportunity for all, is influencing growth decisions.** Over half of respondents (55%) listed reasons related to the schools white paper as one of their motivations for future MAT growth.

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- 12 The trend of increasing separation between layers within the MAT's governance structure continues.** Trustees are increasingly holding fewer additional roles within the trust. 76% of trustees now do not have another role in the trust, up from 71% in 2021. This marks a big shift from 2018 when only 21% said they had no other role.



# Part one

## Tiers of governance

Roles and responsibilities

Significant separation

Local governance

Communication between tiers

### Roles and responsibilities

2022 marks a record for the number of respondents governing in trusts, across all levels, who have contributed to the survey. Overall, almost half of all respondents (47%) of the survey govern in a trust setting including SATs. This is up five percentage points since 2021, and a slight overrepresentation compared to national data which shows 46% of schools and 43% of governance volunteers are in trusts.

Respondents govern in trusts of different sizes, at different stages of their development. While the MAT system is maturing, it is still very much evolving.

There is a minimum requirement for all MATs to operate with at least two tiers in their governance structure – the members and the trustees. Trustees also act as company directors who are accountable in law for all decisions about their trust and its academies. While not a statutory requirement, the vast majority of MATs carry another crucial tier that contributes to the findings of this report – the local tier, which this survey looks

to interrogate. The local tier in most MATs is formed by having academy committees at school level, commonly known as local governing bodies.

By extracting the viewpoints of both MAT trustees and those serving at the local tier, as well as some responses coming from MAT executives, this report provides a unique and multi-faceted picture of MAT governance and the issues MATs are facing.

Of the 4,185 survey respondents in 2022, a record number of respondents govern in trusts:

- 47% govern in trusts, a five percentage point increase since 2021 and the highest year-on-year increase since 2016
- 19% (803 respondents) were MAT trustees – this compares to 728 in 2021 but is the same percentage
- 16% (651) governed within the local tier of their trust, an increase of three percentage points from 2021
- 12% (501) were trustees of a SAT, an increase of two percentage points compared to 2021

		2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Headcount	Academy	38%	42%	47%	50%	53%	55%	57%
	LA Maintained	62%	58%	53%	50%	47%	45%	43%
Number of schools	Academy	25%	29%	34%	38%	41%	43%	45%
	LA Maintained	75%	71%	66%	62%	59%	57%	55%

Figure one, headcount of pupils in state schools in England and number of state schools in England 2015-2022.





Half of MAT respondents identified as trustees (51%), a quarter (25%) were chairs, 13% vice chairs and 8% were committee chairs. A new category for this year resulted in 3% (N= 22) of responses coming from MAT CEOs. For respondents serving on the local tier of the MAT, 38% were chairs, 14% vice chairs, 6% committee chairs, 40% were other local governors and 1% were headteachers of a school within a MAT.

Meanwhile, over half of schools continue as SATs or local authority (LA) maintained; while the majority of SATs are secondaries, the vast majority of these are primary schools, including many of the small and rural primaries. While more of the nation's pupils are now taught in academies, there are more schools yet to convert than have already converted.

### Significant separation

Clear separation between the layers of governance means that the individuals making up one tier of the governance structure of the organisation do not also serve on another tier. It appears that with each passing year, the level of separation between tiers is increasing. More and more trusts are now thinking through the importance of separation and are appointing different people in different roles, rather than having the considerable levels of overlap commonly seen during the past decade.

This year, 76% of trustees said they do not have another role in the trust, this is a five percentage point increase compared to 2021. Just 12% of trustees now sit on the local tier, 9% were members and 3% were chief executives. This marks a big shift in practice.

Those governing in a SAT were most likely to have another role in the trust – which for SATs would be as a member, compared to MAT trustees (24%) and local governors (16%).

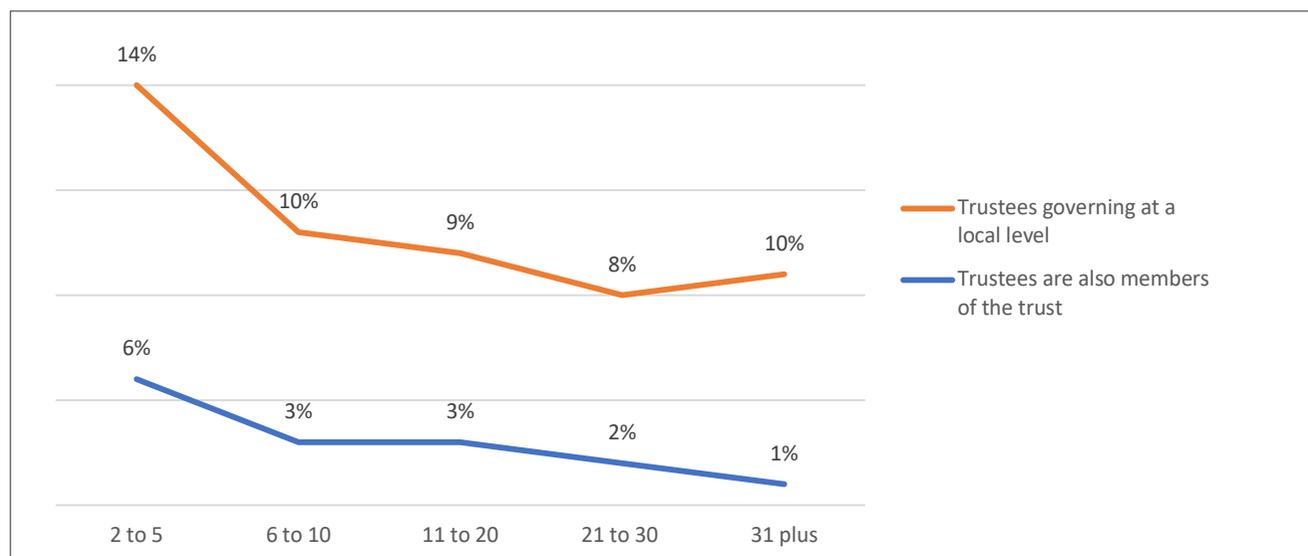


Figure two, levels of separation by size of MAT.

### Our voice



For several years, NGA has lobbied the DfE to focus more on greater separation between members and trustees. In the past, many more respondents could have answered the survey from multiple viewpoints, undertaking more than one governance role for the trust, for example as both a MAT trust and a member.

Given that members are the guardians of the governance of the trust, however, it is logical that they are different people to the trustees, for the simple reason that it is difficult to hold oneself to account. Likewise, trustees should not sit on the local tier as this can confuse two distinct layers of the governance structure, creating conflicts. While it is crucial that the local tier act as advocates for their schools and pass information to the trust board, trustees need to be making decisions in the interests of all the trust's pupils, not just those in one particular school. Moreover, there are implications for trustee workload which is likely to become unmanageable.

2018	2019	2020	2021	2022
Trustees sitting on a local level/governing at a local level				
72%	51%	50%	41%	33%
Trustees who are also members of the trust				
73%	33%	32%	19%	12%

Figure three, the percentage of trustees who also sit on a local level and are members of the trust between 2018 and 2022.



## Local governance

Local governance within MATs forms the bridge between the trust board and its schools. Each year, the annual governance survey has continued to show that local governance remains integral to the governance of the vast majority of MATs. The findings in 2022 have verified this once again and are particularly timely given the attention given to local governance in the schools white paper:

“So that trusts continue to be responsive to parents and local communities, all trusts should have local governance arrangements for their schools”

Opportunity for All – schools white paper, March 2022

While the DfE has clarified that it will not be mandating that trusts have local governance, it has also stated its aim is for all schools to have a “voice in the governance of their academy trusts through local governance arrangements, as already happens in most trusts”.

In 2022, 90% of respondents agreed that their trust board is committed to ongoing local governance arrangements, with 53% strongly agreeing. Just 3% did not agree with

this statement. Of those that agree or strongly agree, 54% were trustees and 46% were local governors. Of those that disagree or strongly disagree, 44% were trustees and 56% were local governors.

When asked about local governance arrangements:

- 91% have arrangements for each school – this compares to 84% in 2017, showing more trusts are valuing this model than ever before
- 6% have committees covering more than one school
- 1% have other local governance arrangements

These figures are similar to 2021, where of those that did have governance arrangements, 90% had arrangements for each school. While respondents who have committees covering more than one school has seen four percentage points decrease.

While NGA, among others, has been keen to explore more potential innovative approaches to local tier governance, this has not developed in the way we expected. As shown once again in 2022’s findings, with 9 in 10 of trusts with local

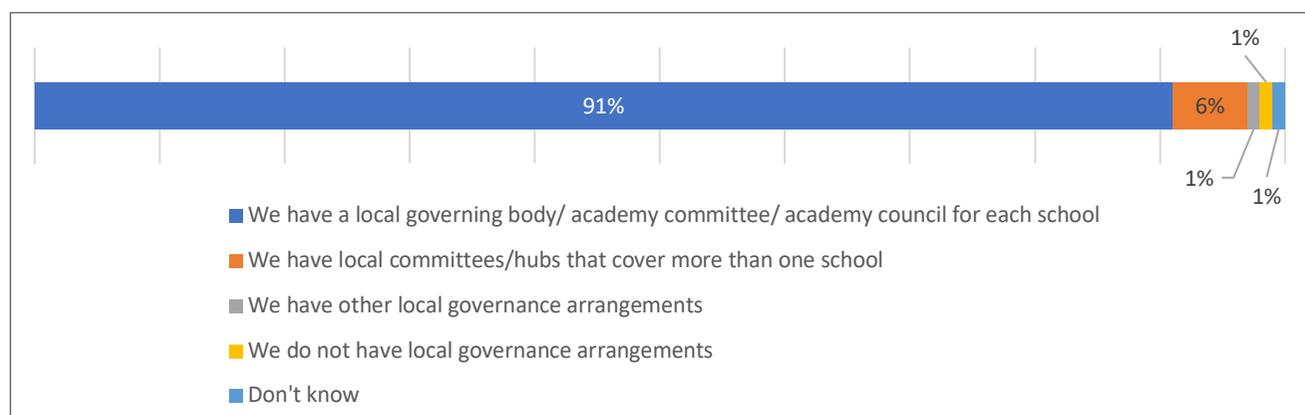


Figure four, respondents’ local governance arrangements.

## Your voice



‘The impact of focusing accountability for the quality of education onto the central MAT team makes good sense as they are professional educators, but the lack of specific local and community knowledge will still make local academy boards valuable.’

Chair, Academy committee

‘We have advocates linked to core trust strategic priorities – this is a new model, but one that very much reflects the trusts commitment to local governance for the long term.’

Trustee, MAT

‘The central MAT teams are less aware of local pressures and the impact of central workload being driven down by many teams. LGB’s are good at managing feedback up and down the chain and raising awareness of stress, workload strains and inefficiencies.’

Chair, Academy Committee

‘Contact with and understanding of the parent body; the visibility of local governance enabling community endorsement and flexibility in responding to local conditions.’

Chair, Academy Committee

‘Knowledge of and relationship with the school is vital to ensure we are overseeing good governance and asking the right questions.’

Vice chair, Academy Committee

‘We would lose our identity and the ability to be a community school.’

Trustee, MAT

‘Its unique character and potentially its links with the local community might be lost.’

Co-chair, Academy Committee

‘Each school is unique and has different challenges ...I feel these needs would not be properly recognised if we lost our LGB.’

Governor, Academy Committee



governance maintaining a local committee per school model. After more than a decade of trusts trialling models such as shared local governing bodies, clusters and hubs, regional tiers and other innovations, experience is leading trusts to return to the straightforward – ‘one school, one committee’ model. The exception seems to be where there are trusts with small schools very closely located.

“We have mixture of single school LGBs and LGBs which cover more than one school where recruitment of local governors is difficult e.g., small rural schools.”

CEO, MAT

“Currently exploring a move to cluster governance due to the challenges of recruiting to LGBs.”

Trustee, MAT

### Reasons for not having local governance

There were very few trusts without local governance, and therefore the survey did not yield significant evidence for why trusts don’t utilise a local tier, but there were some very limited

examples of trusts removing the role of the local tier, although not always as a permanent move. Reasons for not having local governance at all included:

“Our Board manages all 3 academies without a local governance body. These were not working and it was essential that the Board took full control given the scale of the financial, premises and attainment problems faced by our schools. This arrangement has proved to be very successful, but the Board understands that it will need to adapt and change once the Trust grows.”

CEO, MAT

### What does the local tier do

Despite significant improvements in recent years, some MATs report that they still struggle to bring the layers of governance together in a harmonious way. Deciding what to delegate remains a significant matter of debate for trusts seeking to establish a model that promotes positive relationships and effective working between the layers rather than division.

Practice to date shows overwhelmingly that MATs are giving the local tier a role linked to school improvement through monitoring pupil outcomes (95% compared to 91% in 2017).

Stakeholder engagement (93%) and being advocates for the community (84%) are also very likely to be applied to the local tier role. There is a significant increase in MATs giving the local tier a role in stakeholder engagement, up from just 65% who said the same five years ago in 2017.

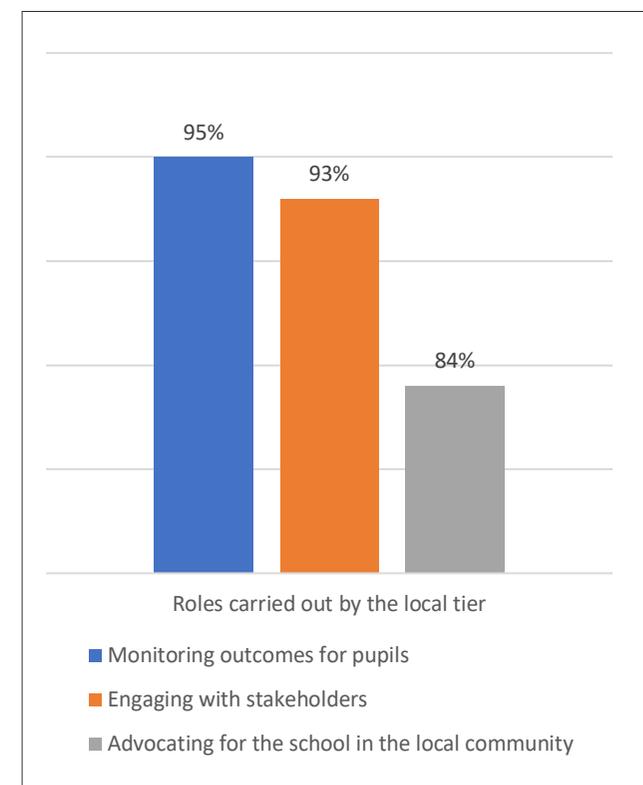


Figure five, the roles most often carried out by the local governance tier.

### The value of local governance – Our voice



NGA champions local governance in MATs because it provides:

- Better decision making at trust level where trust boards draw on the intelligence gathered at school level
- More strategic and generative governance at trust level with some tasks delegated to the local tier
- A better understanding of the trust’s role and how individual schools fit into the trust’s structure
- More diverse views adding to the richness of discussion and challenge
- A positive contribution to the checks and balances of trust governance
- More active engagement between the school and its wider community
- More support for individual schools and the trust from stakeholders
- A local focus on accountability, keeping the trust grounded in the realities of the community and providing a legitimacy for the trust
- Challenge and support to the trust board and central team



The most common roles not carried out by the local tier were monitoring financial management – with over a quarter (27%) not undertaking this role and performance management/appraisal of the headteacher, with a similar number (25%) saying they had no role in this.

While monitoring how finance is spent is now one of the roles least likely to be applied to the local tier, 70% still did have a financial role of some kind. Given that increasingly MATs manage finances centrally, it is interesting that over two thirds of academy committees still maintain some financial responsibility.

One area where there has been a lack of clarity for some MATs is the performance management of headteachers at school level. In MATs, headteachers are held to account through line management with an executive leader undertaking their performance management.

One in four (25%) respondents said that they do not have a role in appraisal of the headteacher with a further 7% unsure. 68% of respondents did say that they had a role in appraisals, but this was the lowest rated of all roles. The number carrying out this function compares to just over half who were responsible for the appraisal of the headteacher or head of school in 2017, suggesting many MATs still value having a local input and so retain a role for the local tier, most usually with the chair of the local committee contributing directly.

### Communication between tiers

Since NGA first started working with MATs, one of the most returned to topics has been communication between the layers of governance. This has often been identified as a significant barrier in getting governance relationships right. Governance in MATs demands an ongoing focus on multiple schools. One of the most cited ongoing challenges for MATs, particularly as they grow, is how communication channels are enhanced to ensure they keep pace with the evolution of the trust.

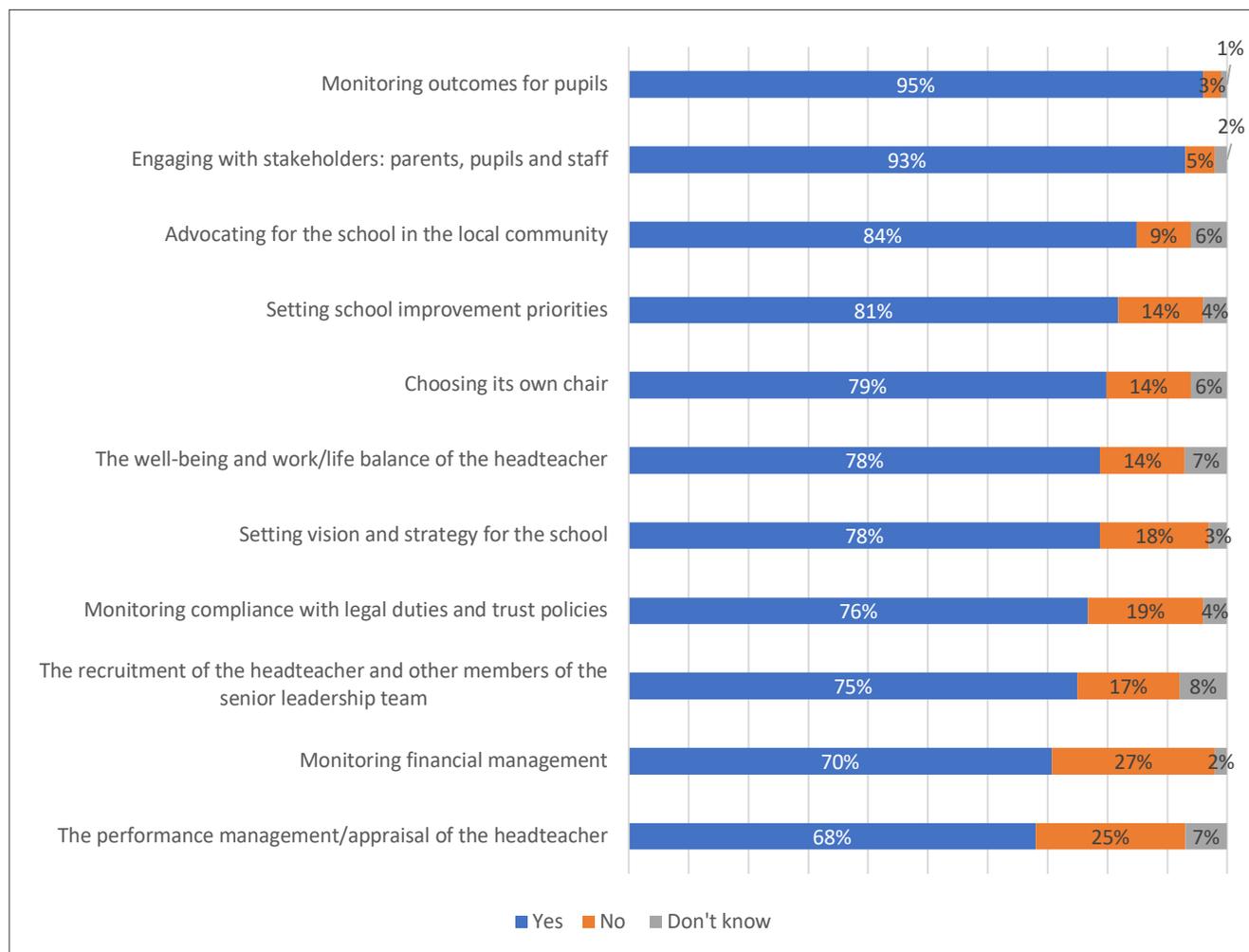


Figure six, the roles most and least carried out by the local tier.



This year, 61% of those at a local level agreed or strongly agreed with the statement “Communication between the local and trust board level is effective and managed well”. This is a slight increase from 59% in 2021, and 58% in 2020, revealing a steady and positive trajectory. However, the slow pace of improvement shows a more concerted effort is needed by the remaining two in five trusts.

By size of trust, 75% of respondents in MATs that had 31 plus schools agreed with this statement, compared to 82% of respondents in MATs with 21-30 schools. However, the response in MATs with 2-5 schools dipped to just 58% of respondents.

The top three most popular methods of communication between governance tiers were:

1. Regular local chairs’ meetings (63%)
2. Internal briefings (eg newsletter) (52%)
3. Regular cross-MAT governance network events (38%)

It is also encouraging to see the rising popularity of regular local chairs meetings. 70% of respondents who engage in regular local chairs meetings agreed that communication between the local and trust board level is effective and managed well.

Regular cross MAT governance network events have now replaced ‘trustees sitting/governing/observing at a local level’ (33%) out of the top three communication channels for the first time since we have asked this question. This also reflects a gradual decline in the number of trusts being reliant on an overlap of individuals sitting on multiple layers, down to 33% from 41% in 2021, and down from 51% in 2019.

Although a trust governance professional role is important to coordinate the two-way communication of the local tier and the trust board, which also had the benefit of increasing the visibility of trustees with local volunteers, it was only selected

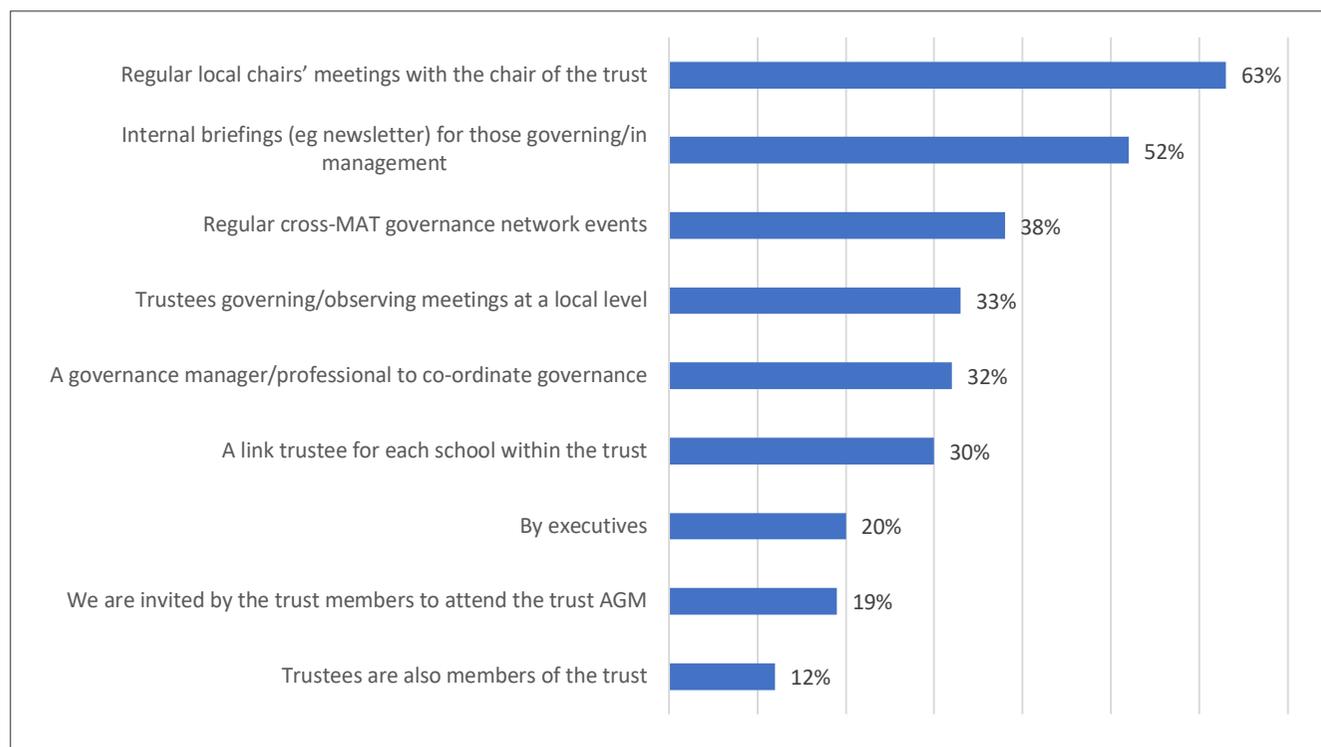


Figure seven, the methods used to communicate with the local tier of governance.

### Our voice



In NGA’s 2021’s [MATs Moving Forward: the power of governance](#) report, NGA wrote that the instigation of regular chairs’ meetings, where the chairs of academy committees or equivalent are gathered with the chair of the board of trustees to update each other to exchange information, share ideas, practice and plans, and to gather views, became a more prevalent activity for MATs during the pandemic.

This brought the widespread introduction of virtual governance, helping to introduce new, dynamic and easier communication channels for such networks. This year’s findings suggest that this was not a one off due to the need to keep in touch during school closures, but a more permanent move to enhancing MAT communication channels. We suggest that this practice should become universal.



as such by a third of respondents. This suggests there is much more which can be developed. 32% of respondents had a governance manager/professional to co-ordinate governance. This is up from 26% last year. 28% in 2020.

While the bulk of communication activity shown in the above graph reflects a move to stronger governance practice, it is of note that the proportion of MATs inviting the local tier to attend the trust AGM remains fairly low. This backs up the view that this is an as yet fairly unexplored route to improving MAT communication that more MATs could adopt.

Less than a third of respondents said their trust orchestrated a system of link trustees.

### Communication methods by size of trust

There is some clear variation in communication methods by MAT size. Smaller MATs are more likely to communicate by trustees sitting/governing/observing at a local level and by having consistent clerking (using the same governance professional for communication across the trust). Both methods are easier to sustain for a smaller trust but experience has taught us that trustee involvement at the local level can be problematic. Good communication should not be dependent on the duplication of roles where individuals governing at several levels act as a conduit for disseminating information.

Those governing in larger MATs were more likely to report using channels such as internal briefings, the employment of a governance manager or professional to co-ordinate governance across the organisation and regular cross-MAT governance network events.

This may, in part, be because larger trusts are more likely to have the resources to employ a professional dedicated to trust wide governance practice.

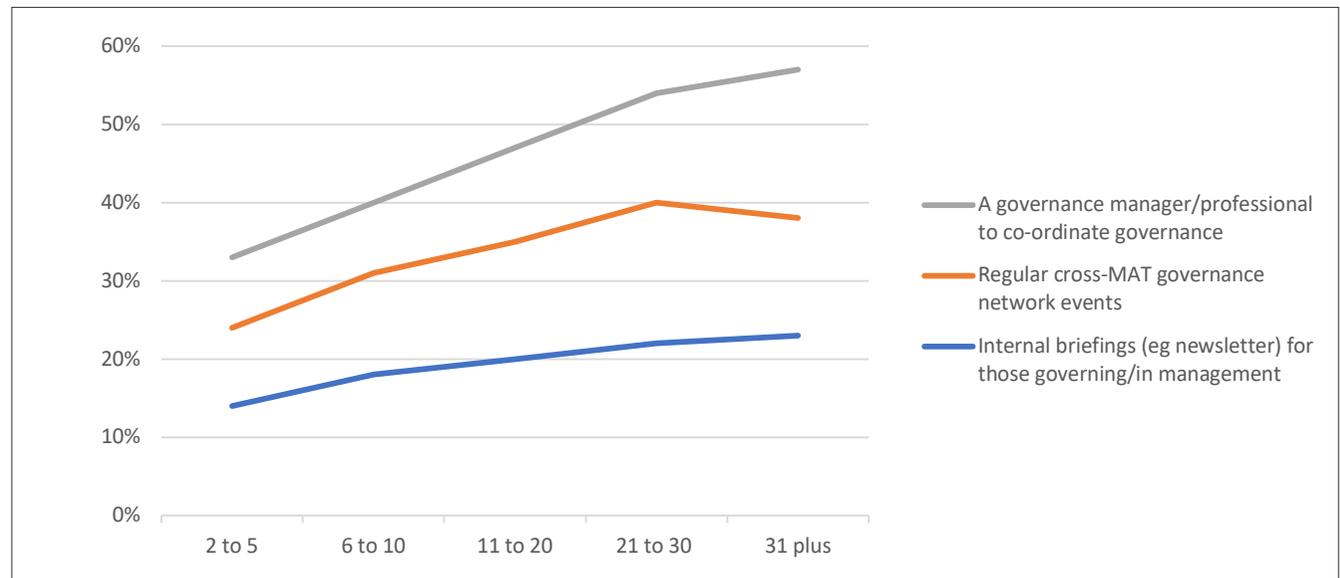


Figure eight, the methods used to communicate with the local tier of governance that increase with MAT size.

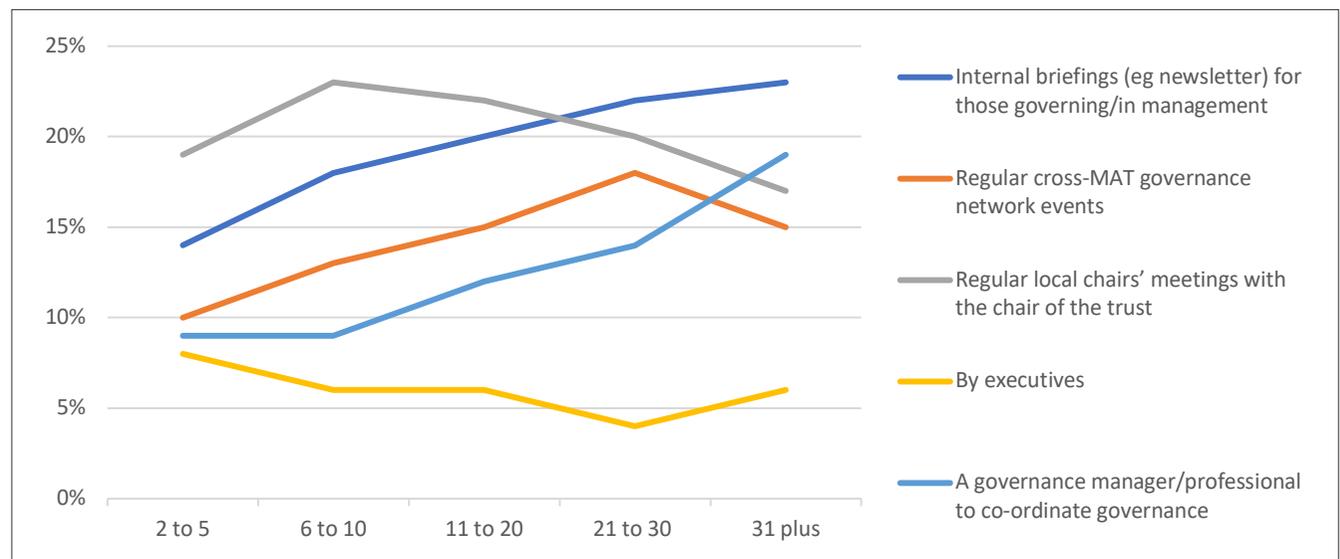


Figure nine, the methods used to communicate with the local tier of governance by MAT size.



Governance professionals are a crucial component in setting high expectations for trust governance, yet not all MATs have chosen to make the same level of investment in the governance professional role. While appointment of these roles is still lower in smaller trusts, generally the findings reflect an upward trend of more MATs appointing trust wide governance professionals. These roles can help ensure MAT governance communication channels are enhanced, and trust wide roles and expectations are understood by everyone involved in the governance of the MAT.

Regular local chairs' meetings with the chair of the trust, keeping in touch via executives, and being invited by the trust members to attend the trust AGM, remained consistent across all MAT sizes.



## The future of the local tier – Our voice



Earlier in 2022, NGA published [MAT governance: the future is local](#), a thought piece exploring the local tier's story over the last ten years or so. In doing so we put forward our suggested 12 expectations for the local tier of MAT governance:

- 1. Communication** – two-way communication is crucial, including regular meetings with the trust board chair, vice chair and chairs at the local level.
- 2. Separation** – MAT governance has three layers for a reason, and to ensure accountability those serving on each layer must remain distinct. The trust maintains a clear distinction between accountability through governance (by the trust board and its committees) and accountability through line management by executive leaders.
- 3. Investment in professional, expert support** – there must be a lead governance professional in any MAT to guide and connect the work of local committees and the trust board, with professional clerking of every academy committee.
- 4. Clear delegation** – a good scheme of delegation is essential to ensuring harmonious working between the layers of governance. Local governance enhances trust board accountability as its eyes and ears at the school level.
- 5. The local tier does not have its own committees** – an academy committee is in itself a committee of the trust board, and the fourth tier of governance is unduly complicated.
- 6. A meaningful, welcome and accepted role in challenge** – you do not remove the local committee simply for being challenging. There is a formal process for removing governors including an appeals process.
- 7. A local tier formed by local volunteers, not executives** – executives do not attempt to control the conversation.
- 8. Trust boards are visible and accountable to the local tier** – local governors are invited to hear the work of the trustees as a minimum on an annual basis through the AGM or via other means.
- 9. The trust CEO and executive team include input from the local tier** – namely the chair, in the performance management of school heads.
- 10. The trust values and seeks engagement from the local tier in the recruitment of new heads** – including the local chair in the recruitment process.
- 11. A whole trust governance development plan** – that encourages governors to learn from schools outside their trust.
- 12. The local tier retains a contribution to school improvement** – and is aware of what the school's budget is and the plan for how it is to be spent.

NGA has since tested these expectations on a variety of audiences – NGA's own MAT network, through our leadership forum and with a group of MAT CEO's. There has been clear support for the expectations.



## Part two

### Being part of a MAT

Interest in joining or forming a MAT

Perceptions of being in a MAT

MAT size and growth

MATs and money

#### Interest in joining or forming a MAT

The findings on the appetite for schools not yet part of a MAT wanting to join or form one reveals a split perspective. On one hand a record number of SATs, federations and LA maintained schools are now considering academising and deciding to go ahead with it, but while overall the appetite for joining a trust is increasing, it is doing so at a subdued rate.

Overall, the number of maintained schools and SATs deciding to join or form a trust has nearly doubled since 2020 from 6% to 11%. But the percentage of schools actively pursuing

this remains small, especially considering the push for academisation contained within the white paper.

However, it is advisable to consider that this figure is likely to have already increased and will most likely show an increase next year. While the survey opened a month after the publication of the white paper, many boards would have only just started to digest what it was saying and what it potentially means for them as a school.

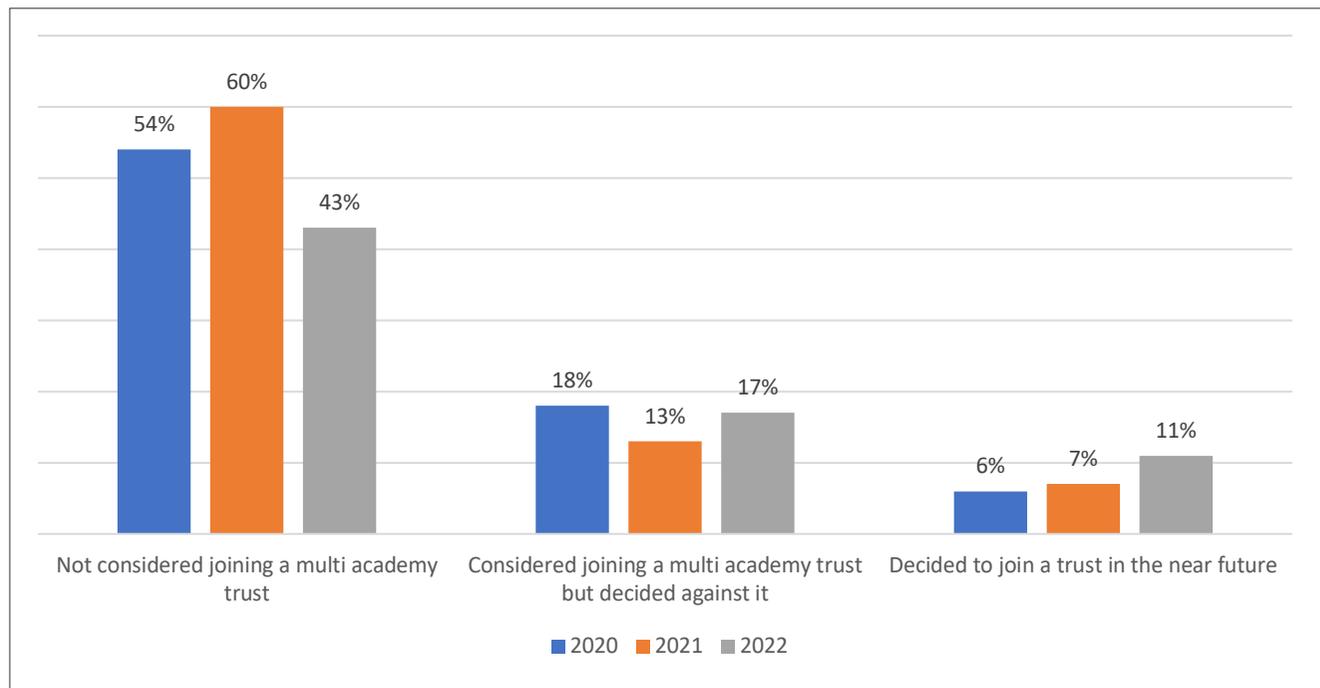


Figure ten, consideration of joining a MAT from LA maintained school or single academy trust respondents 2020-2022.



It is also helpful to look at this from another angle. While 43% of respondents have still not considered joining a MAT, this is actually down from 60% in 2021 and 54% in 2020, showing that the conversation on whether and when to join or form a trust is generally on the increase.

Despite many SATs reporting to NGA a strong resistance to becoming part of a MAT in the past, SATs were more likely to consider joining or forming a MAT – 35% of SATs want to join or are joining a MAT, compared to just 14% of maintained schools. 25% of SATs have considered this option but ultimately decided against it. LA maintained schools, including federations, were top (60%) for not considering joining a MAT.

While only a very small number of respondents wanted to join a MAT but could not find a MAT to join which suited their school, interestingly, SATs were most likely to feel this way with 9% choosing this response.

When looking at regional variances, London was the least likely region for schools to express an interest in wanting to join or form a trust. The South West and Yorkshire and Humber were the regions most likely to have schools exploring becoming part of a MAT.

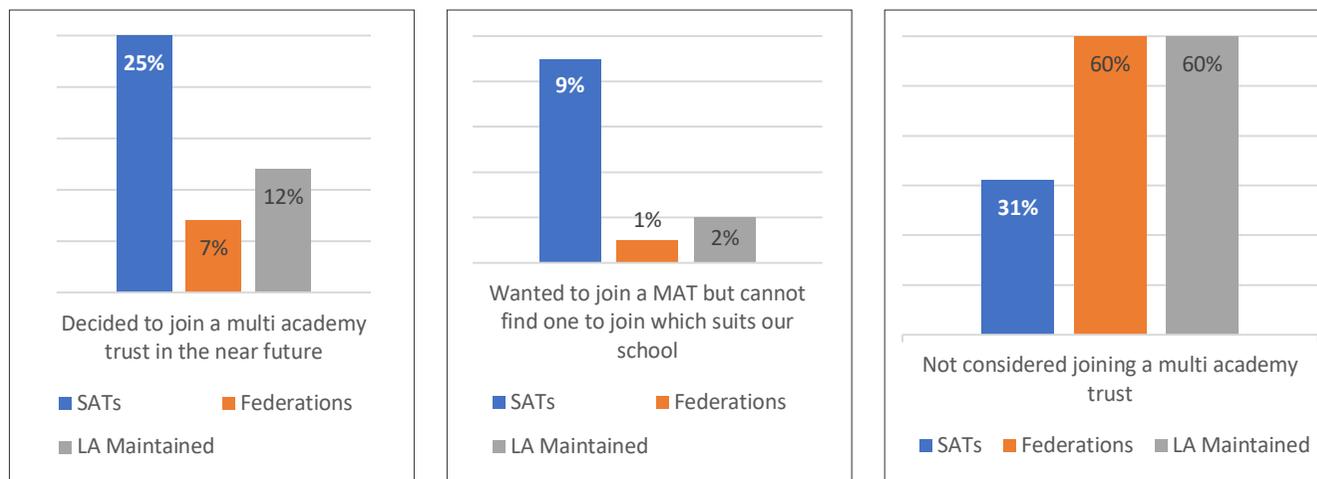


Figure 11, SATs, Federations and LA maintained schools' opinions on academisation.

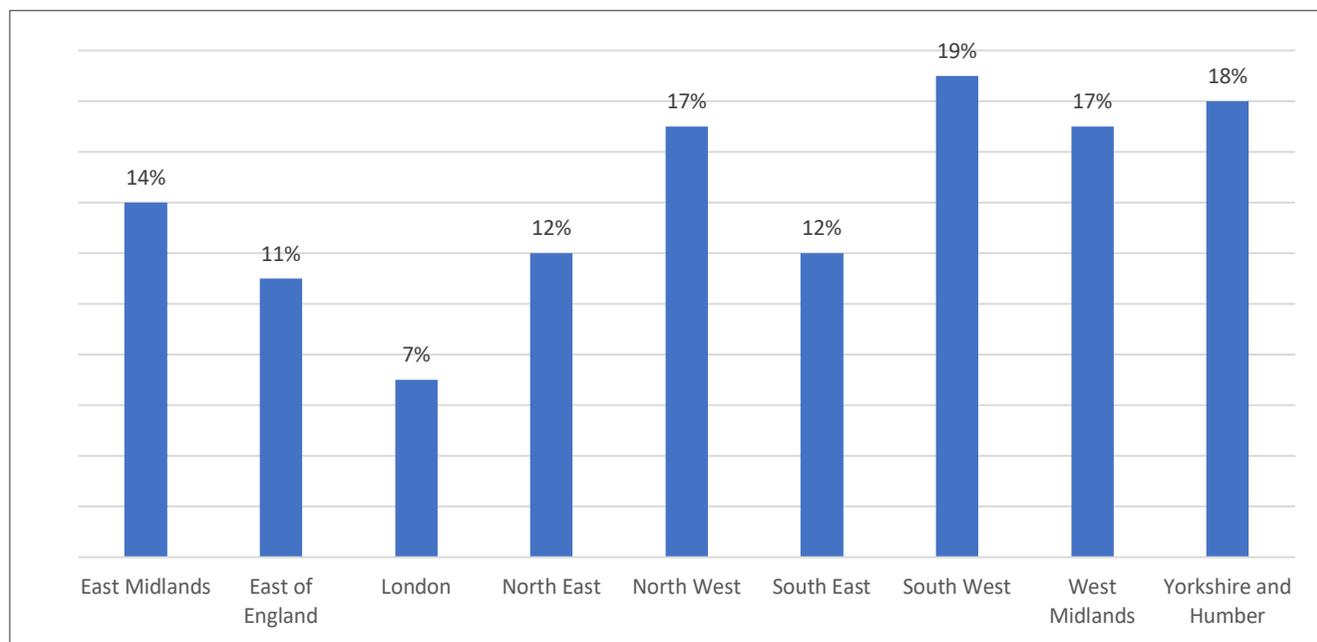


Figure 12, the percentage of respondents in each region that have wanted to or decided to join a trust



## Your voice tells a story – the appetite to join or form a trust



There were many different reasons provided for the decisive factors in steering conversations on academisation and joining or forming a trust. Some, such as a school's financial position, or concerns regarding autonomy or not finding a trust with compatible values are factors that have become a well-rehearsed part of the sector's story to date. Other factors, such as the impact of the pandemic and the publication of the schools white paper are much more recent, revealing the complexities and challenges facing the government's plans for a fully trust based system:

### The white paper and government's drive for a fully trust based system

'We prefer our independence but are aware this may not continue to be a choice; we will be researching and revisiting the issue on an ongoing basis and will be alert to local discussions on MATs.'

Committee chair, Secondary SAT

'Just started the discussion about the future direction given the recent white paper and diocesan status.'

Chair, LA maintained, Primary

'We are feeling pressurised to join a MAT even though it may not be in the school's best interest.'

Committee chair, LA maintained, Secondary

### Schools actively looking to academise but barriers are preventing progress

'Application rejected by RSC, due to local authority concerns (which they did not discuss with us or seek evidence prior to rejection).'

Chair, LA maintained, Primary

'Explored joining a multi academy trust but could not find one aligned with our school's values.'

Committee chair, LA maintained, Primary

'We have a MAT we want to join, and they want us, but deficit issues are preventing it happening – even though it would best resolve the deficit position.'

Chair, LA maintained

'Nothing in the past year but in the two years before engaged with various organisations including detailed due diligence with one MAT but found the culture different and not compatible.'

Chair, Secondary SAT

### Unconvinced by the case or not currently viewing finding a trust to join as a priority

'Discussing but the evidence is not available to support the theory that MATs are better than SATs or LA maintained.'

Chair, Secondary SAT

'Our wider community of stakeholders did not support MATs and there was, at the time, very few well established MATs to choose from in our geographical area ... we choose to form a Cooperative Trust with 5 other schools ... We will not consider joining a more formal partnership until we have had sufficient time to evaluate the impact of the Coop on pupils/schools post Covid.'

Chair, LA maintained, Primary

'Have considered and rejected many of the above options but not in the past year. Covid has meant we have concentrated on supporting the school in dealing with essential business.'

Governor, LA maintained, Secondary

'We started looking at some MATs but did not go further due to Covid and staffing problem.'

Chair, LA maintained, Primary

## Our voice



In February 2022, before the release of the white paper, [NGA interviewed chairs of maintained schools](#) to understand their views on academisation to further validate our thinking and the qualitative evidence from our annual surveys. Our information on why boards, both maintained schools and SATs, choose not to join a MAT corroborates similar DfE conclusions:

- An attachment to locality and local collaboration.
- A fear of being 'taken over' by a large organisation, often distant geographically, that will not have the interests of their community at the heart of their decision making in the way the current board does.
- The lack of persuasive evidence on the benefits to pupils of being in a MAT, including by MATs with whom governing boards are having exploratory conversations.
- Lack of leadership capacity to prioritise the work involved, particularly the case where a) schools are small; b) potential collaborators are Church of England and others are not; and c) benefits of the change perceived as minimal.





## Perceptions of being in a MAT

Strong MAT governance relies on the organisation knowing who and what it is and a collective understanding and drive towards one trust vision from all tiers of governance within the trust. Time has shown that negative perceptions of the trust from those governing within it, particularly at local level, can drive a sense of persistent fragmented identity. This can ultimately prevent the governance and executive structures from working together, stalling a trust's development journey.

NGA's 2021 report, *MATs Moving Forward*, also identified that the significant identity struggles some MATs face are closely linked to how the MAT engages with stakeholders. This is particularly relevant when we look at the general feeling expressed overall. All but two areas showed a marked improvement in 2022 compared to previous years, with one of the exceptions being how engaged MATs are with parents and the wider community.

Figures 13, 14 and 15 reflect the views of those serving on the local tier, offering their perceptions of the trust as a whole.

In 2021, NGA reported that between 2019 and 2021 the percentage of respondents who felt that their school is part of one organisation with others within the MAT had stagnated (from 62% to 60%). However, 2022 has presented a significant positive upturn, with over 70% saying their school feels part of one organisation, with only 6% strongly disagreeing, and a further 14% somewhat disagreeing.

This is the first real sign of improvement in three years, marking a 10 percentage point increase from last year. Given that misconceptions persist in some quarters that MATs are collaborative partnerships rather than single organisations with schools formally joined together through a single governance structure – its relevance is perhaps more noteworthy than it may appear. It is also particularly relevant

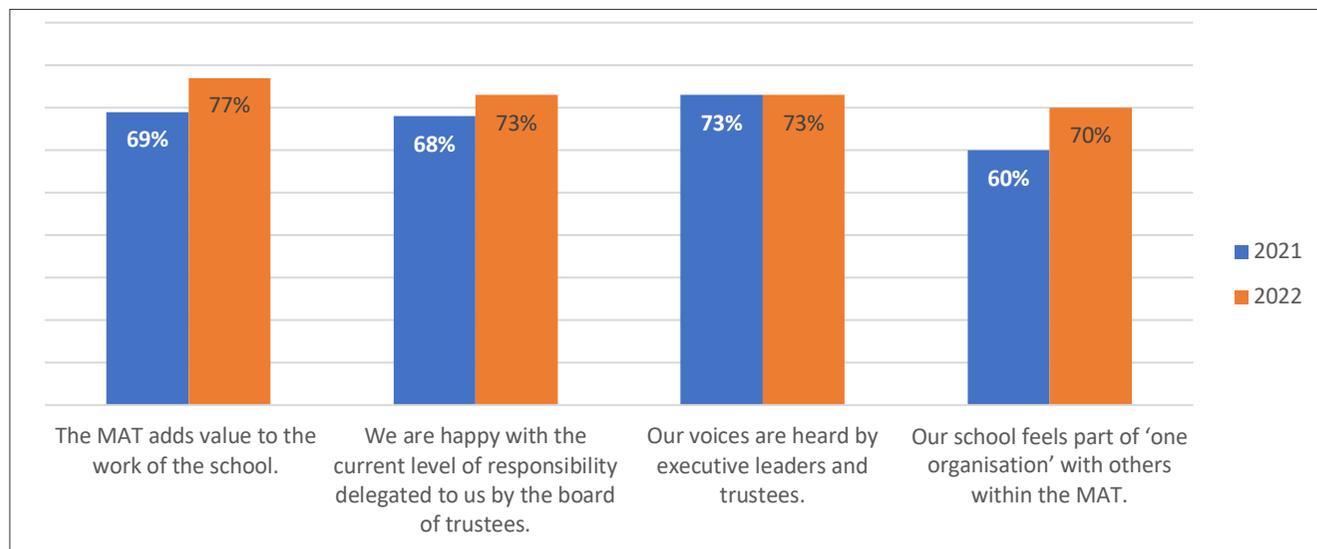


Figure 13, the highest rated statements about being within a MAT compared to 2021.

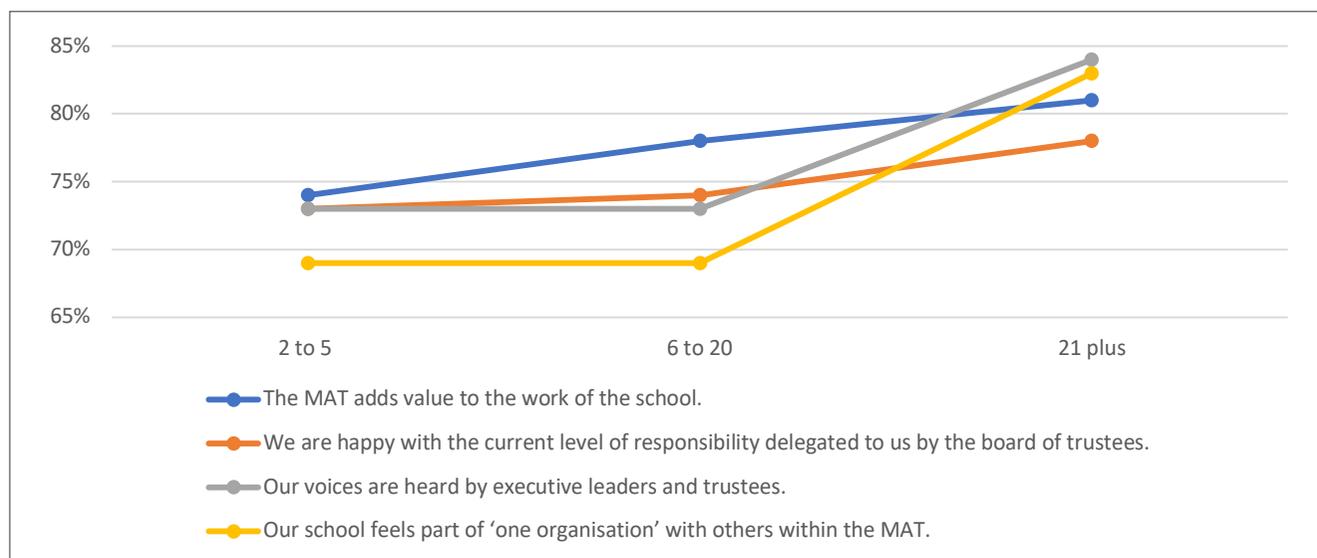


Figure 14, MAT opinion statements compared to trust size.



to the DfE's drive for a trust based system. Research published by the DfE in November 2021 on the benefits and obstacles of joining a MAT showed that 77% of schools were concerned about losing their identity and the impact this has: the more schools that join a trust, and are then positive about their identity as part of a trust, may help to alleviate some of these fears.

### Value added

The strongest positive sentiment expressed overall was that the MAT adds value to the work of the trust, with 77% agreeing and only 11% disagreeing, 12% had no view. This is an eight percentage point increase in positive responses from 2021 and up significantly from the 65% of respondents who agreed with this in 2018. Interestingly, those serving on the local tier of the larger trusts were most likely to agree (81% of trusts with 21 or more academies). This backs up a conclusion from [NGA's 2018 MAT case studies series](#), which found a pattern when trusts forge a collective identity retrospectively. This was often as a result of reaching a certain point of development, emphasising the need to embrace change, increase buy in from schools and wanting to get to the bottom of what a trust stands for.

Just under three quarters of respondents are positive on how they engage with both executive leaders and trustees, feeling that the central tiers of the MAT do listen to what they have to say. Meanwhile, despite the variability in what can and is delegated to the local tier discussed earlier, the majority, at just under three quarter (73%) say they are happy with this – marking a five percentage point increase compared to last year.

### Sharing resources

The strongest negative sentiment from those who govern locally was that resources, including reserves, should be shared with other schools in the trust with 33% disagreeing, and 50% agreeing. This compares to 28% disagreeing in 2020 that they would be happy for resources in their school to be shared across the trust.

The feelings on sharing resources and reserves feed very much into the wider debate around the identity of schools and the MAT as a whole, as well as how schools feel about centralisation and localisation. The centralising of MAT finance, both in terms of governance and management, has been much debated, with many schools within trusts reluctant to give over the control of their finances to the central MAT function. While recent years have brought about a renewed level of recognition and appreciation for centralised support and expertise, in part as a direct result of the pandemic, fear around a lack of local expression and decision making

still exist. Schools and local stakeholders, as well as those governing on the local tier, want their locality to be seen and understood, and some MATs struggle to persuade them that this can be done without some control of resources.

### Community engagement

This year, there was a lower percentage of local governor respondents who said that they felt their MAT effectively engaged with parents and the wider school community.

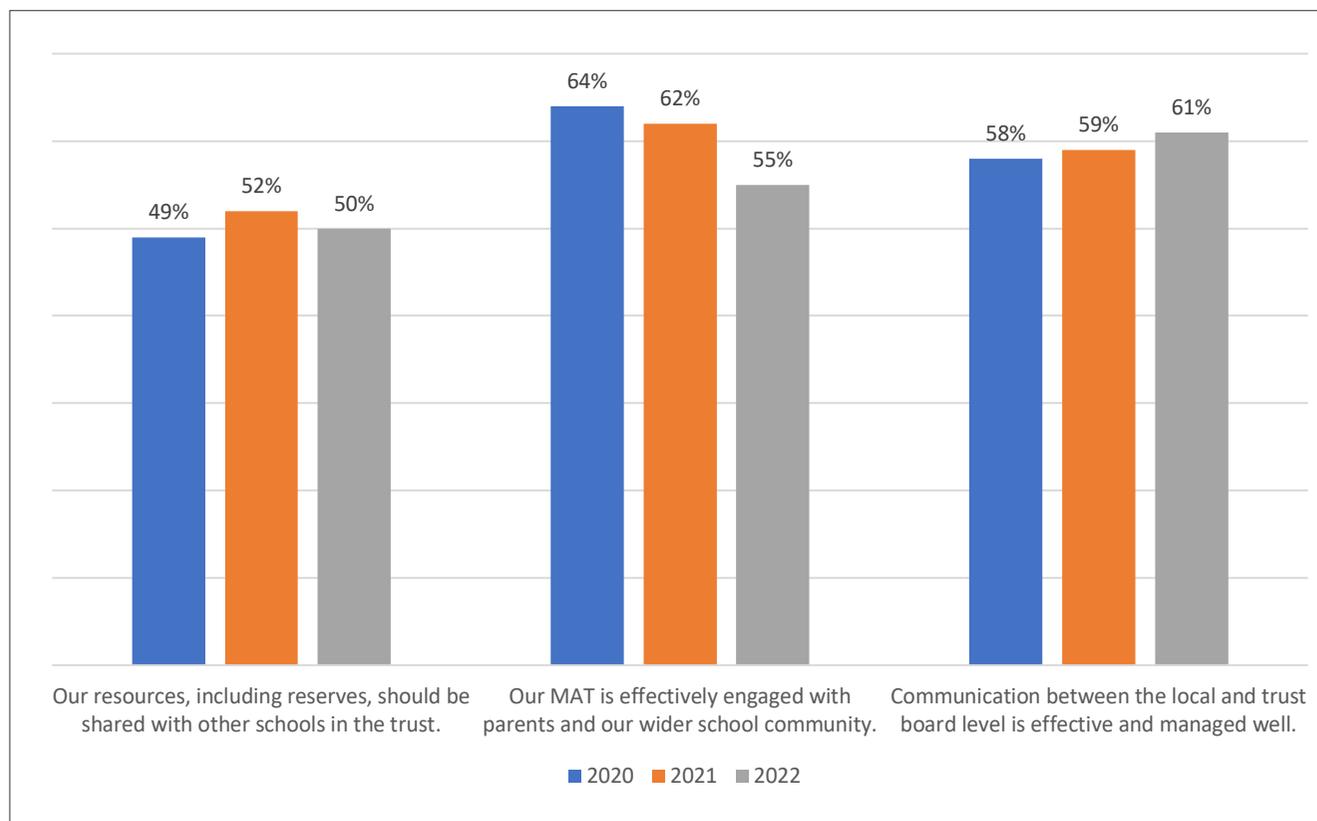


Figure 15, MAT opinion statements 2020 to 2022



Only 55% agree with this statement. Concerningly, this marks a drop of 62% in 2021 and 64% in 2020, showing a downward trend following the positive stories of increased levels of engagement that emerged with the arrival of the first lockdown during the pandemic. The most likely group to say this were those in MATs of 21 or more academies (85%).

## MAT size and growth

There has been an almost continuously changing view as to the most effective size of a MAT and the importance of the geographical proximity of its schools. There are different advantages and disadvantages to being small or large. While all efforts to date to find the optimum size of trust have been hard to evidence, this year marked a significant moment in the systems history with the introduction of a growth trajectory for MATs included within the DfE's schools white paper:

“We know that trusts typically start to develop central capacity when they have more than 10 schools. Scale is also what enables them to be more financially stable, maximise the impact of a well-supported workforce and drive school improvement ... We expect that most trusts will be on a trajectory to either serve a minimum of 7,500 pupils or run at least 10 schools.”

Opportunity for All – schools white paper, March 2022

This year's survey saw an increase in the number of larger MAT responses. Respondents from smaller MATs have rapidly decreased in the past year reaching their lowest figure since we began to ask in 2016. MATs with 2 to 5 academies have seen a nine percentage point decrease since 2021 meanwhile those with 6 to 10 and 11 to 20 have both seen a five percentage point increase this year.

There is of course a logical explanation to this in that most MATs are growing year on year, encouraged to grow by the department's drive for academisation and its trajectory for growth, and so there is a natural cycle of small MATs moving

to a medium sized category and medium sized MATs also, in turn, becoming larger.

Despite the increase in larger MATs responding, the highest single size category remained 2 to 5 academies at 36%, however this has seen a decrease from 45% compared to 2021. Medium sized MATs saw strong increases in responses with 6 to 10 academies now at 35% and 11 to 20 now at 20%.

## MAT growth – during the last year

44% of all MAT and local academy committee respondents said they had increased the number of schools within their MAT in the past year. This is a three percentage point increase compared to 2021. This question was first asked in 2020 when 42% had increased the number of academies within their MAT.

During the past year, MAT growth has been dominated by larger trusts. Smaller trusts (2-5 schools) have seen a decrease in expansion this past year whereas medium to larger MATs have seen significant growth – only 21% of MATs varying from 11 to 31 plus schools said they hadn't grown in the last year, compared with 56% of MATs with 2-10 schools.

The top reasons for MAT growth in the last year were:

1. Having suitable schools which wished to join (23%)
2. Being a part of their strategy (23%)
3. Having capacity to support more schools (21%)
4. Improving outcomes for pupils (17%) – dropping from first place in 2021

Of those who had grown in the past year, the majority of trusts planned to grow again in the future (57%) – a five percentage point increase on 2021 but a seven percentage point decrease compared to 2020. Interestingly, a significantly higher number of respondents were unsure about their growth after growing in the past year (26% in 2021 and 40% in 2022).

	2021	2022	Nationally
2 to 5	45%	36%	25%
6 to 10	29%	35%	26%
11 to 20	15%	20%	27%
21 to 30	5%	5%	9%
31 schools or more	6%	5%	13%

Figure 16, the size of MATs in 2021 and 2022 according to NGA's annual survey.

## Our voice



The introduction of the DfE's growth trajectory for trusts was followed closely by the caveat that the department would monitor the size of trusts carefully and cautioned against MATs growing before they were ready. There will also be a limit on the proportion of schools controlled by one trust in a given locality.

The lessons hard learnt by those who did not manage growth well in the past decade seem to have permeated the sector with far fewer reports of trusts growing exponentially, and governing boards instead taking time to consider what is best for their pupils and if they have the capacity to share what they are doing well with others – the growth trajectory now issued by the department does not seek to undo these hard fought lessons.



Of those who hadn't grown in the past year, most respondents were likely to plan for growth in the future (61%). This figure remains the same as 2021 but seven percentage points higher than 2020.

In terms of differences by region, in 2021/22:

- The North East saw a 14 percentage point increase in the number of MATs adding schools to their trusts up to 56%.
- The East of England, North West, South West and West Midlands all saw a slight fall in the number of MATs that had added schools.
- While London remains by far the smallest region for MATs adding school, the region did see a significant jump from 18% to 26%.
- Other notable jumps included the Yorkshire and Humber region, jumping almost 20 percentage points in one year, and the North East, jumping 14 percentage points.

### MAT growth – in the future

Of those who knew, 87% said they plan to increase the number of schools within their MAT in the future. This is a very similar picture to 2021 and compares to 82% of MAT trustees saying they planned to expand the number of academies in their MAT in 2017, showing that growth has always been a top priority for trusts.

Respondents were then asked what the main reasons were behind wanting to expand their MAT in the future and were asked to tick all answers that applied. The most popular reasons for growth in order were:

1. It is part of the trust strategy (59%)
2. Economies of scale (58%)
3. Wanting to improve outcomes for pupils (58%)

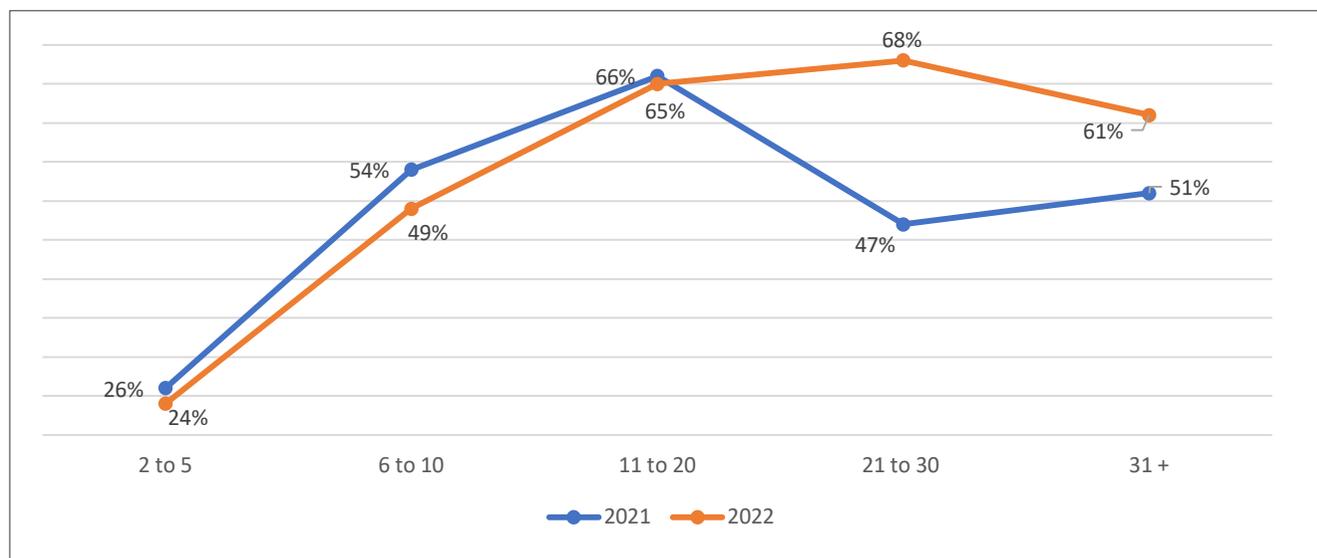


Figure 17, the expansion of different sized MATs in the past year compared to when last asked in 2021.

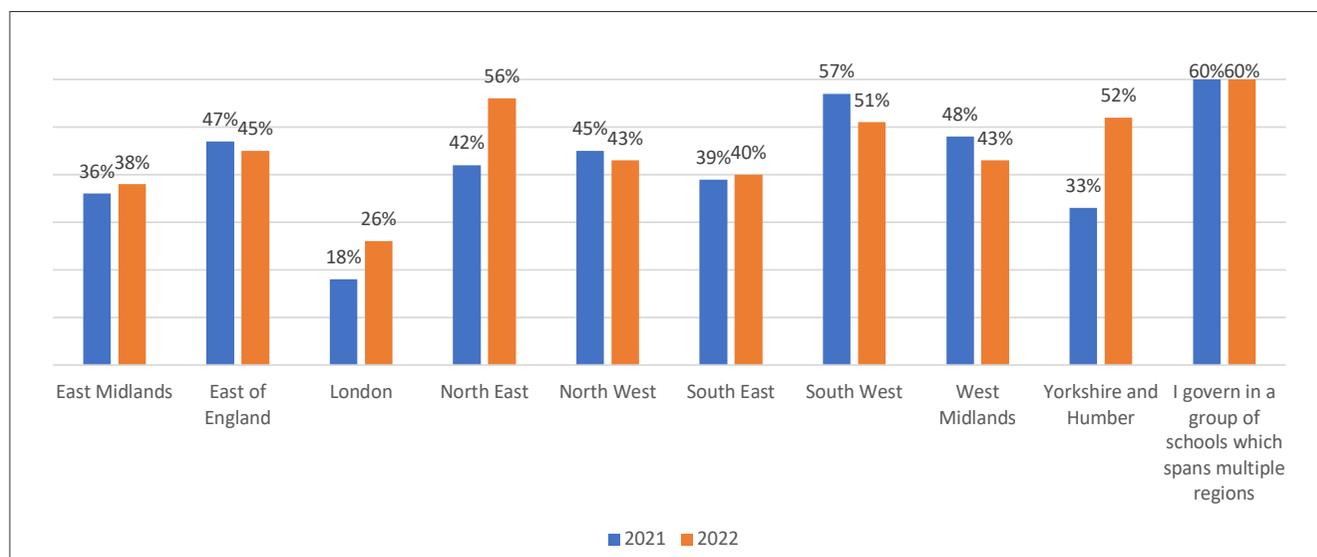


Figure 18, the percentage of respondents in each region that have increased the number of schools within their MAT in the last year compared to when last asked in 2021.



There has been a slight shift in the main drivers for future expansion. It being part of the trust's strategy has leapfrogged improving outcomes for pupils which took the top spot in 2021 at 71%.

Perhaps the most significant change in drivers has been economies of scale taking the joint second spot and jumping to 58% from just 30% in 2021. Economies of scale may arrive at different times and sizes for different trusts, but it is clearly a major consideration for trusts when deciding future direction.

It is also of note that when grouped together, reaching optimal size and capacity to support more schools were reasons given by 72% of respondents compared to 44% in 2021.

While not quite making the top three reasons, well over half of respondents (55%) chose reasons relating to the schools white paper for future MAT expansion. Within this, nearly a quarter (23%) of respondents planned to grow their MAT in the future due to specifically wanting to follow the DfE's trajectory towards 10 schools or 7,500 pupils.

While smaller MATs were less likely to have grown during the last year, they were the most likely to say that they intend to expand the number of schools within the MAT in the future. 60% of MATs with 2-5 schools, and 58% of MATs with 6-10 schools said they planned to expand, compared to 36% of MATs with 21 to 30 schools, and 36% of MATs with 31 plus schools. Mid ranged sized trusts with 11-20 schools were mixed, with just over half of them saying they would expand.

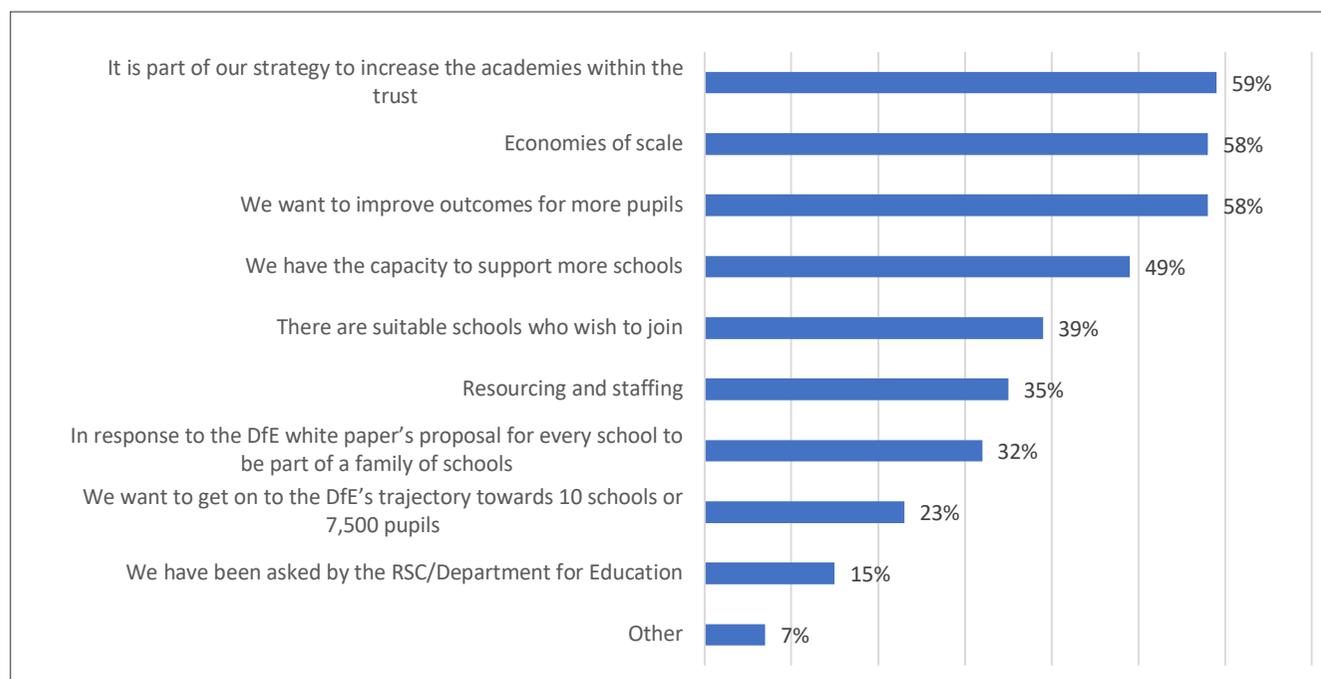


Figure 19, the reasons for MATs wanting to increase the number of academies within their trust in the future.

## Your voice – What were the main reasons for expanding the number of schools within your MAT?

'To benefit from additional shared support.'

Committee chair, All-through MAT, 11 to 20 academies

'To ease financial pressures.'

Vice chair, Academy Committee, Primary

'For the wellbeing of children.'

Trustee of a Primary/Secondary MAT, 21 to 30 academies

'Diocesan strategy to build large multi academies.'

Governor, Academy Committee Primary

'Expansion placed on us by RSC/Government.'

Committee chair, SAT, Secondary

'No plan – ad hoc according to schools available to join.'

Chair, Academy Committee, Secondary, 6 to 10 academies

'I believe there are advantages to having more pupils in our Trust in terms of the available capital funding and taking us ... to something more secure.'

Chair, Academy Committee, Primary

'To justify the cost of central services.'

Governor, Academy Committee, Secondary



Regionally, the location of trustees who were most likely to say their MAT planned to grow are:

- East of England (64%)
- Yorkshire and Humber (56%)
- North West (56%)

This reflects an overall shift from 2021, with two new entries to the top two most likely regions. London as a region has dropped from the second most likely region for MATs to want to expand, to joint bottom position.

### MATs and money

The trust board plays an essential role in maintaining financial oversight of the organisation and all trust boards should agree on how the overarching strategy for achieving the vision of the trust is resourced and funded. The trust board will also rely on the chief executive and possibly the local tier to help achieve this, but as our survey findings show, this isn't always the case.

The current financial position of MATs remains steady and is overall very similar to what has been reported since 2020 – while money remains a hugely significant concern, MATs are better placed than any other school type or structure in terms of balancing the budget:

- 86% of MATs feel they are able to balance income and expenditure – this compares to 78% in 2021.
- 29% of MATs overall also said they could retain a healthy surplus – a three percentage point increase from 2021.

This makes MAT respondents the most financially secure of all school/structure types and continues the narrative we first reported in 2021 that the advantages of financial management and governance across a group of schools has materialised, at least for some.

Despite this, MAT respondents had significant concerns regarding the long term and whether they will be able to afford what the organisation wants to achieve. When asked if they

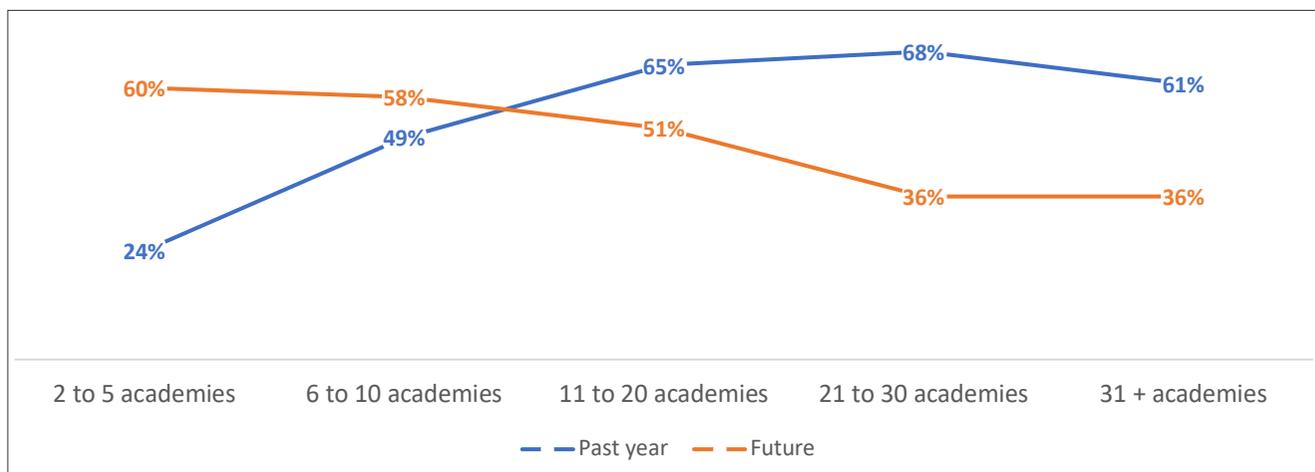


Figure 20, the expansion of MAT in the past year and desire to increase the size of the MAT in the future compared to current MAT size.

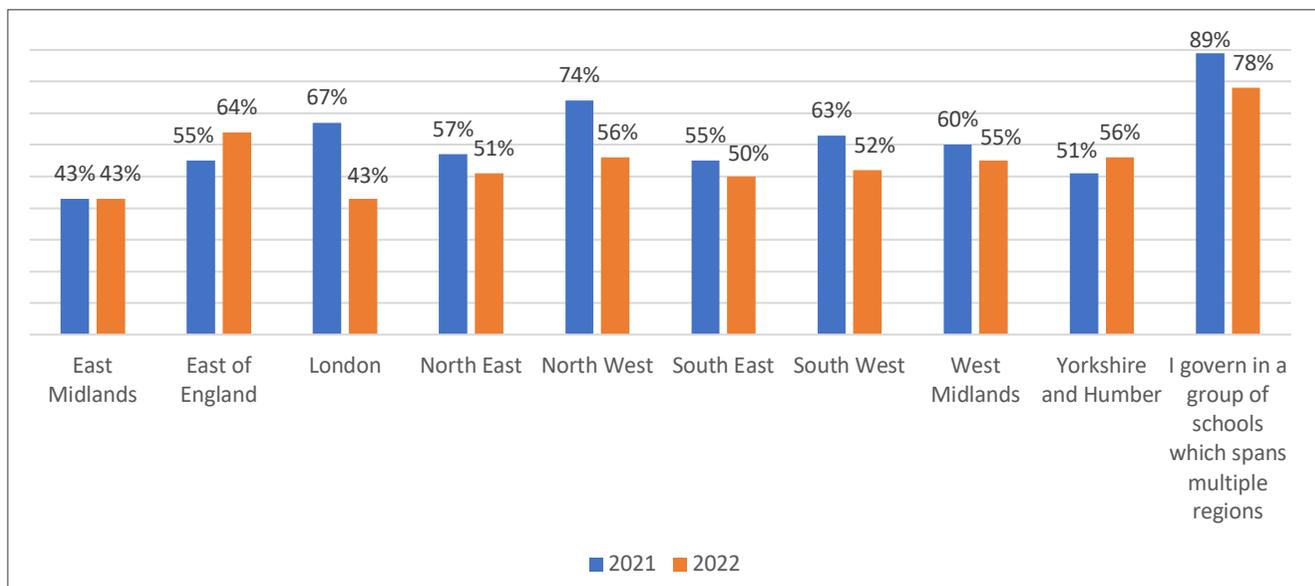


Figure 21, the percentage of respondents in each region that plan to expand the number of schools within their MAT in the future compared to when last asked in 2021.



believe that their school or trust is sufficiently funded to deliver its vision and strategy to meet the needs of all pupils, there was a further reduction in 2022 of confidence among MAT trustees, with only 41% agreeing, compared to 44% in 2021.

Meanwhile over half of local academy committee respondents (53%) believe that their school is insufficiently funded to deliver the vision and strategy to meet the needs of pupils.

But there is also increasing anxiety about the more medium to long term, with MATs also beginning to show increasing concern about finances, along with every other school or structure type. Those considering their trust to be financially sustainable with current levels of funding and income has dropped from 37% in 2021 to 35% in 2022 for MAT trustees, with local governor respondents even less confident dropping from 31% to 25%.

For all academy trusts, projected pupil numbers and staff pay costs jointly held the position of the biggest challenge impacting a balanced budget. These figures remain in line with 2021. In response to financial anxiety, nearly one in five SATs (18%) said they are likely to join a group of schools over the next 3-5 years to ensure financial sustainability.

We then asked MATs which action they are most likely to pursue in the next 3-5 years to ensure financial sustainability, with the top five answers being:

1. Collaborate with other schools (17%)
2. Income generation strategy (15%)
3. Staff restructure (14%)
4. Review contracts for the supply of goods and services (11%)
5. Don't know (10%)

More findings on the financial position of multi academy trusts are discussed in the third report:

► [The priorities and challenges facing our schools](#)

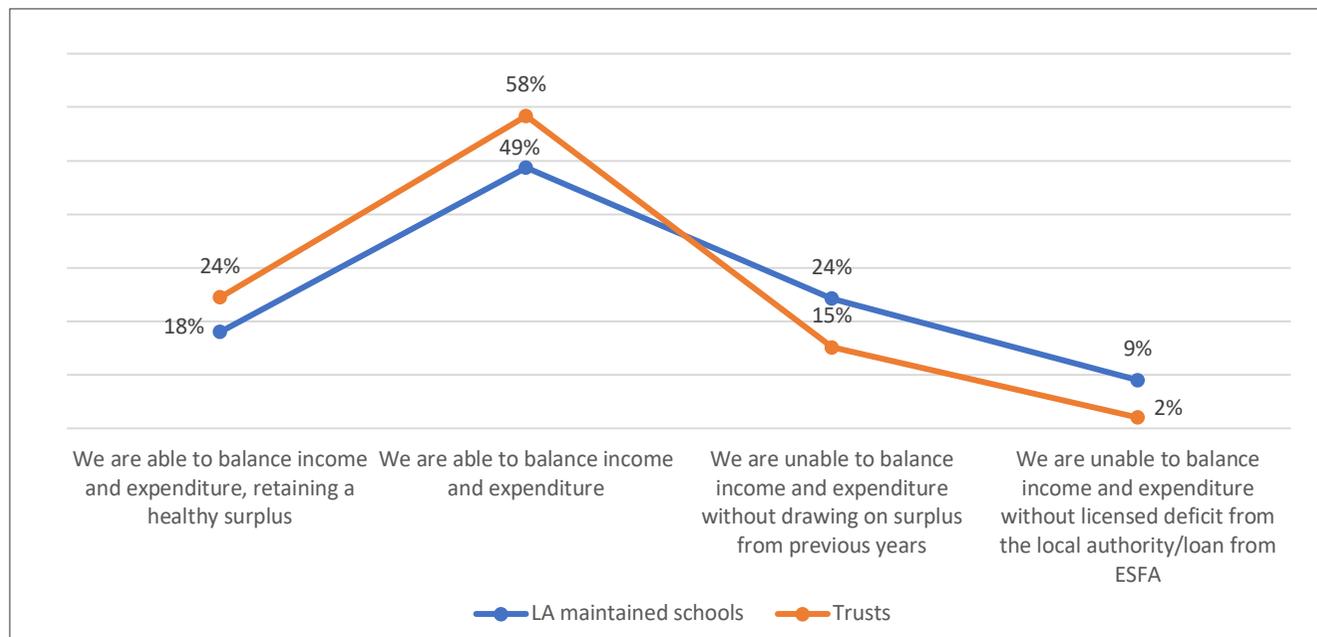


Figure 22, the financial position of school or trust compared to governing board type.

## School and trust governance 2022

### In this series:

- Governing in a multi academy trust
- Governance volunteers and practice
- The priorities and challenges facing our schools

Find the full series of school and trust governance in 2022 reports at:

[www.nga.org.uk/governance2022](http://www.nga.org.uk/governance2022)



## Further reading



KNOWLEDGE CENTRE

### NGA Knowledge Centre guidance

- **Taking the next step: joining or forming a MAT:** A guide for senior leaders and governing boards considering joining or forming a MAT, produced with ASCL and Browne Jacobson. [nga.org.uk/taking-the-next-step](http://nga.org.uk/taking-the-next-step)
- **MAT mergers: a guide for trustees and trust leaders:** This guide, jointly developed by NGA and Browne Jacobson, outlines the process for merging two MATs. [nga.org.uk/MATmergers](http://nga.org.uk/MATmergers)
- **Budget setting in an academy trust:** This guide helps trustees understand the fundamentals of budget setting. [nga.org.uk/budget-setting-trusts](http://nga.org.uk/budget-setting-trusts)
- **Understanding the role of the local tier:** This guidance sets out why governance at the local level is important and provides advice on developing successful structures and local functions. [nga.org.uk/role-of-local-tier](http://nga.org.uk/role-of-local-tier)
- **Model schemes of delegation:** help those governing in MATs decide the best governance structure for their school/s in order to be effective. [nga.org.uk/matschemes](http://nga.org.uk/matschemes)
- **Members of the academy trust:** This resource provides an in-depth introduction to the role of members in a trust. [nga.org.uk/members](http://nga.org.uk/members)

### NGA research

- **MAT governance: the future is local (2022):** This paper sets out the features of successful local governance and explores the learning from established MAT governance structures.
- **MATs moving forward: the power of governance (2021):** This report explores the progress on the key issues in multi academy trust governance identified in NGA's 2019 report Moving MATs forward report.
- **NGA's MAT case studies series (2018-19):** These detailed case studies explore the lessons learned by five MATs in their journey since inception.

The entire suite of NGA MAT research can be found at: [nga.org.uk/research](http://nga.org.uk/research)



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