

## Appendix 2

### Evaluation criteria for merger proposals of Church of England MATs

The following criteria will be used by the Diocesan Board of Education (DBE) as part of its due diligence processes in deciding whether to give its consent for a Church MAT to merge with another Church MAT or a Community (secular) MAT. The documentation is an appendix to the DBE Academy Strategy ‘Shaping our Future Together to 2030’ which can be found here: <https://www.cofeguildford.org.uk/education-schools/academy-trusts/>

	Evaluation Criteria	Evidence required
A	<b>Legal protections for Church of England Schools</b>	<p>The DBE will only consider the following Articles of Association for MATs seeking to merge and take Church schools:</p> <ul style="list-style-type: none"> <li>• Church of England Majority Articles</li> <li>• Church of England Articles with Equity Clauses</li> <li>• Members and Trustees of both MATs must agree to use the model Church of England documents including Church of England Articles of Association for the merged trust</li> </ul>
B	<b>Commitment to Christian character of Church schools</b>	<ul style="list-style-type: none"> <li>• A fresh articulation of a new Christian vision for the merged trust which aligns with the Church of England vision for education and the DBE’s own vision for education</li> <li>• Recent SIAMS inspection judgements of the existing academies in both MATS</li> <li>• An evidenced based proven track record of promoting and supporting the Christian character of their existing schools in line with the requirements of new SIAMS framework</li> <li>• Tangible evidence of capacity to support Christian character and ethos of all Church schools</li> </ul>

C	<b>Multi-Academy Trust Sustainability</b>	<ul style="list-style-type: none"> <li>• A business plan which demonstrates the long-term sustainability of the new MAT which includes: <ul style="list-style-type: none"> <li>❖ staffing in the merged central team</li> <li>❖ staffing levels in schools</li> <li>❖ impact on pupils through school improvement capacity</li> </ul> </li> <li>• A clear growth strategy to achieve scale over time</li> <li>• <b>A commitment to take further Church of England schools, including small schools</b></li> <li>• Does the proposed merged MAT have any plans to merge with other Church MATs in the future?</li> </ul>
D	<b>School Effectiveness and Quality of Education</b>	<ul style="list-style-type: none"> <li>• An evidenced based, track record of school improvement and enhancing the quality of education of their schools</li> <li>• Recent Ofsted inspection judgements of the existing academies in both MATS</li> <li>• Tangible evidence of capacity for school improvement across a number of schools</li> <li>• A commitment to safeguarding culture and practices across the Trust and all of its schools so that all pupils and staff are able to flourish, safe from harm and abuse</li> </ul>
E	<b>Inclusion and Diversity</b>	<ul style="list-style-type: none"> <li>• A commitment to the merged Trust being an organisation that upholds equity, diversity, inclusion and justice</li> <li>• An approach to SEND and disadvantage that puts children first and demonstrably addresses the challenges facing the sector</li> <li>• An aspiration that the merged trust can have a greater reach than as small trusts to effect change with other local civic institutions</li> </ul>

<b>F</b>	<b>Trust governance, local governance and the appointment of Foundation governors</b>	<ul style="list-style-type: none"> <li>• Diocesan Members appointed by the DBE (through GDET) which secure the majority (or equal number of Members appointed for Trusts seeking Equity arrangements) – see Article 12</li> <li>• A minimum of three trustees appointed directly by the Diocesan Corporate Member (see Articles 50 and 50A in the model articles)</li> <li>• A clear scheme of delegation for Local Governing Bodies (LGBs) which sets out which areas will be delegated to the LGB including the development of the Christian character of every Church school which aligns with the expectations of the SIAMS framework (committees)</li> <li>• The appointment of ‘Foundation governors’ to LGBs approved by the DBE</li> </ul>
<b>G</b>	<b>Geography and location of existing academies</b>	<ul style="list-style-type: none"> <li>• The location of the existing academies in relation to each other and the MAT central offices and the travel required between academies</li> <li>• A clear plan to enable schools within the same geographical area to collaborate together such as hubs/regions/clusters which make sense and would enable other Church schools to join in these geographical areas</li> <li>• The balance of academies in primary/secondary/further education phases in the existing trusts and the proposed new merged trust</li> </ul>
<b>H</b>	<b>Pupil transition</b>	<ul style="list-style-type: none"> <li>• A logical approach to the transition of pupils between the schools in the merged trust which is in the interests of children and families and supports community cohesion</li> <li>• The admissions arrangements for existing academies and the proposed arrangements for the Church schools in the new merged MAT</li> </ul>
<b>I</b>	<b>Regional Director (DFE) support</b>	<ul style="list-style-type: none"> <li>• Does the proposed merged MAT have the support of the Regional Director’s office?</li> <li>• Have the new proposed Trust governance structures been approved by the Regional Director?</li> </ul>