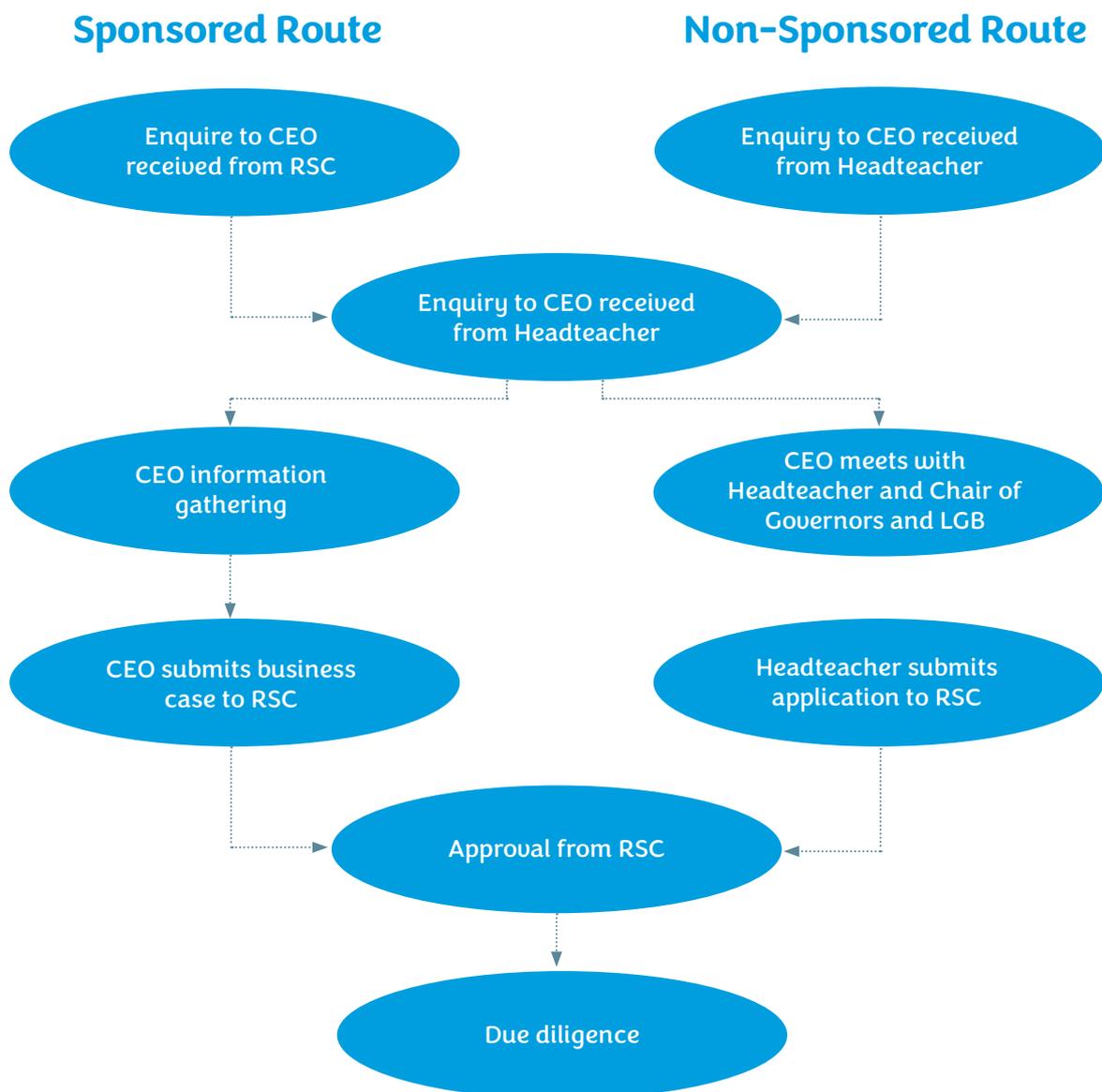




# The Joining Process

Initial enquiries to join the Trust will come from approaches to the CEO, either through the RSC or the Headteacher, depending on circumstances. This is the start of the process of gathering information to enable all parties to ensure that the decision to enter into partnership will be beneficial. Whilst there is a process to follow, as detailed below, Impact Education MAT believes that people make partnerships and the success of partnership agreements depends on open, honest dialogue and shared values. The CEO will consult with the board of Trustees before moving to the next step. Once they have agreed in principle, the CEO will take the enquiry forward and begin gathering information to present back to the RSC for both the sponsored and non-sponsored joining routes.



## Due Diligence

As part of the joining process, the Trust will need to complete a due diligence exercise to evaluate all aspects of the school's performance and highlight any benefits and risks to the RSC and Board of Trustees.

This exercise will consider leadership, including governance, educational performance and plans for improvement, financial sustainability, safeguarding, HR and staffing, ICT, health and safety and estates and facilities management.

## The process

The due diligence process will consist of an information gathering process which will include an initial meeting with key staff from Impact. To conclude the process, the CEO will write a report for consideration by Trustees. The report will list a set of recommendations to enable a successful partnership.

We do not intend for this process to be onerous and would anticipate that a lot of the information requested will be readily available. Some of the information may be collected verbally as part of site visits.

In cases where documentation may not be available, the Trust will make a judgment call as to whether this is critical to complete the due diligence. Where gaps are identified it may be a further discussion is held by a member of the Impact team and the most appropriate person within the school.

We recognise that some of the documentation requested will be needed by more than one team member and will ensure that this is shared appropriately to avoid unnecessary duplication.

The Due Diligence process is as much about us finding out how we can work effectively with you; as you finding out how you can work effectively with us.

Upon successful completion of Due Diligence if a school wishes to move forward and join the Trust, the Trust's central team will work closely with them on the final stage of official paperwork and agree a timetable for induction.

## Review Areas

The list below, whilst not exhaustive gives a flavour of the scope of the areas that will be covered under the due diligence processes:

- **School overview** - OfSTED category, School Development Plan and progress, Self-Evaluation Form (SEF), performance of teaching & learning staff and other key educational outcomes and analysis
- **Strategic overview** - Governance, Policies, Risk Registers, KPI's and legal
- **Financial** - Financial statements, Audit reports, Financial systems, Income & Expenditure, Cash flow, Balance sheet & Tax liabilities, VAT position & practice

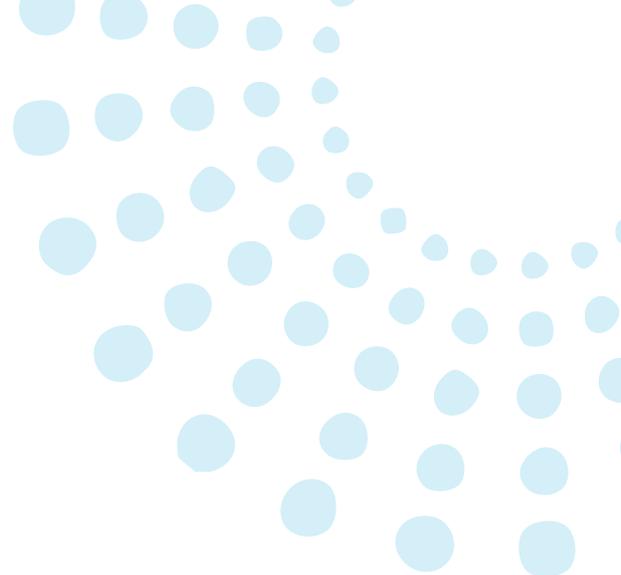
- **Human Resources overview** – Organisation establishment, Pay & Performance, qualifications, skills audit, consultants engaged, complaints
- **Capital Overview** – Condition and Suitability survey's, CIF Bids, Fixed Asset Register, future or on-going commitments, Potential contingent liabilities, Inventories, Fire Risk
- **Asset Condition** – Review of ICT provision, building fabric and site maintenance and condition.
- **Health & Safety overview** – H&S Register, Risk Assessments & Practice, complaints, claims, Insurance review
- **Legal overview** – Records, Data Protection, claims history, HMRC liability, Contractual liabilities, lease management & liability
- **Other overview** – as per agreement with both parties and/or deemed necessary

## Tupe

During the joiner process, the joiner school will begin TUPE consultations with all affected employees. TUPE regulations were put in place to make sure that employees do not transfer to a new organisation on less favourable terms and conditions of employment. This consultation should be done long enough before the transfer to allow meaningful consultation.

It should cover:

- That the transfer is going to take place
- When it is expected to happen
- Why the transfer will take place
- Any implications of the transfer on employees, such as working with a new team using a different IT system,
- And, any other actions the new employer might take such as redundancies or restructuring.
- During consultation the employer must consider any issues raised by the employee reps.

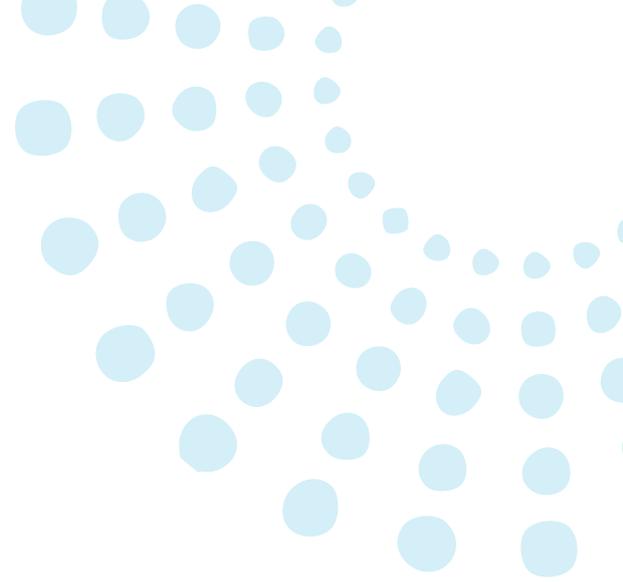


## Induction & Transition

There are some key activities which will take place to ensure that Induction into the Trust is as seamless as possible. We are committed to continuous improvement and we will tailor the induction process to meet individual needs, where appropriate, and develop our approach as we receive feedback about the joining experience from our partners.

Governance transition to Impact Education Multi Academy Trust	Responsibility
All Governors to go through a re-selection process for their role on the Local Governing Body and agree to the Scheme of Delegation and Governance Terms of Reference	In collaboration with Impact Education Multi Academy Trust
All Governors to sign up to our Governors' and Trustees' Code of Conduct	Provided by the Trust
All Governors to complete the 'Register of Interests' form annually	Provided by the Trust
All Governors attend the Trust's Induction Programme (including receiving a full induction pack)	Delivered by the Trust
All Chairs and Vice-Chairs to attend Chair Training and Support sessions throughout the year	Delivered by the Trust
Clerks to attend briefing sessions (where appropriate)	Delivered by the Trust
Governors to receive Safeguarding and Prevent Training within the first term of their appointment	Delivered by the Trust Safeguarding Lead
At least one Governor per LGB to undertake training in Exclusions & Safer Recruitment (if not already completed)	Provided by the Trust
One Governor to be nominated as lead finance governor, agreeing to meet Trust Chief Finance Officer termly	Delivered by Trust CFO
Impact Education Multi Academy Trust to provide all governors with membership to the LA Governor Development	Delivered by the Trust





Staff transition to Impact Education Multi Academy Trust	Responsibility
Head joins the Headteacher Strategy Group (HSG) during the conversion/induction process	CEO
Staff Induction Presentation from MAT	CEO
Staff Induction – handbook (relay new policies) and values/visions booklet, organisational chart	Head & CEO
Induction pack for office: including scheme of delegation, academies handbook, financial regulations, and all other MAT policies, workforce census arrangements.	CFO
Induction pack for the Head: MAT Strategic Plan, Template for Headteacher’s Report and SDP	CEO



## Working For Us

All staff who join the Trust will receive a planned induction to ensure that your career with us gets off to the best start possible. We recognise that your development is important and working for us will mean that you have access to accredited development programmes. Our staff can apply to take part in a range of external development programmes, including:

- NPQML
- NPQSL
- NASENCO
- NPQEL

Role specific CPD is also actively supported e.g Finance qualifications.

You will also have opportunities to develop your skills and knowledge by working across the Trust on school improvement workstreams.

Staff well-being is important to us. All of our staff members have access to 'The Hive' employee portal. This includes round the clock access to telephone or face to face counselling for them and their immediate family.

Other benefits include a cycle to work scheme, gym, mobile phone discounts and a retail discount scheme.

We provide a staff on-line HR Policy handbook so that you can easily look up information on areas such as Maternity/Paternity leave, Attendance procedures and requesting special leave.