

## Bourne Education Trust associate status policy

### Background

In 2017, the then national schools' commissioner, Sir David Carter, provided schools with the option of joining trusts as 'associate members' as a response to the hurdles some schools face in joining trusts. Sir David said that he saw the offer as a positive way forward for schools that might be cautious of joining trusts. As associate members, schools have a more flexible arrangement with a trust – they would be able to access shared resources and leadership for example but would not have to relinquish their legal independence.

The benefits and areas for consideration with associate status are as follows:

- Allows for comprehensive due diligence and mutual understanding
- Reassures local governing committees, particularly of high performing schools
- Provides educational opportunities of sharing ideas and best practice
- Potentially increases leadership capacity
- Supports planned capacity growth within the Trust's executive team
- Allows for immediate partnerships rather than those subject to the lengthy conversion process
- Either side can walk away at the end of the agreement.

### Criteria

The number of associates should be no more than one per cluster, unless in exceptional circumstances. An associate could be the start of a new cluster or bolster an embryonic one. The service that each associate would get will be negotiated on case by case basis. For example, a standalone academy might want more central services faster than a maintained school that already pays a top slice for services provided by the local authority.

The criteria for assessing a perspective associate should include an assessment of its:

- Ethos, leadership capacity and educational standards
- Financial position
- Location and capacity to support or drain its potential cluster.

This should be assessed in conjunction with its perspective cluster's and executive team's ability to support it.

### Types of status

The Trust offers three types of associate status:

1. Associate status with a view to full integration within two years.

*This offer to likely to be made to:*

- *Schools that support our expansion strategy and add to the Trust's capacity*

- *Schools that are likely to be sponsored by the Trust either through direct approach or at the request of the RSC to allow for an immediate working relationship*
  - *High performing schools in different geographical areas that provide new opportunities for the Trust*
2. Associate status with no defined integration period and with both parties accepting the benefits of a long-term relationship that would ideally result in full integration in to the Trust.  
*This offer is likely to be made to:*
- *A key strategic partner e.g. a teaching school and / or SCITT*
  - *Schools or trusts that could support an outlier school*
  - *Schools or trusts requiring significant long-term strategic planning and / or investment which could, nevertheless, provide significant additional capacity to the Trust*
3. Partnership status for a limited period with little likelihood of full integration into the Trust.  
*This offer is likely to be made to:*
- *A trust, academy or school that requires bespoke assistance akin to a school-to-school support contract e.g. a MAT with a financial notice to improve or academy / school requiring interim leadership or support to improve educational standards*

## **Costs**

Each associate status agreement and cost will be bespoke as the leadership, central team and services support will differ depending on the stage of development, the status (maintained or academy) and need of the 'associate' school and the degree to which they are already paying for such services from other providers. What is clear is that an 'associate' must make some contribution such that they are not in effect being subsidised by the trust schools; an 'associate' could also contribute services to the trust resulting in a possible cost neutral position. In practice any such cost is likely to be between 2.5%-3% of the school's GAG income. Costs for a partner would be directly related to the services it requires and their duration.

## **September 2020**