

Building a MAT of the future



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Foreword



Philippa De-Ath
Director, Arbor

Three years ago, conversations about MATs were rooted in the debate between autonomy vs centralisation, mandated by growth. Since then, a change in government has meant the direction of travel is less clear. At the same time, conversations have largely shifted to more imminent problems: recruitment, retention and wellbeing. With changing expectations placed on MATs and pressing issues surrounding the workforce, how do you build a MAT of the future, or even know what that looks like?

At Arbor, this is always on our mind. As a technology provider, we want to create tools and support ways of working which make the lives of schools and their staff easier — particularly in the context of change and growth. Last year, we welcomed SAMpeople, TimeTabler and Habitude into the Arbor School Management Suite in the belief that together, we can make an enormous impact on the working lives of staff. And we also believe in building a community which shares best practice, insights and ideas, so that we can all look to that future as a sector.

That's why, over the past year, we invited trust leaders and education experts to speak on what they're doing to curate innovative and people-first ways of working, and how this builds a strong foundation for their trust's sustainability and future success. This eBook brings together these voices into the first book in our 'Building MAT of the future' series, with a focus on exactly that.

You'll hear from:

- Lisa Marriott, Nicola Noble and Dan Morrow, on how to make flexible working culture a reality and why it's so important
- Mark Greatrex on what a great central team of the future should look like
- Chris Foley on how to manage and embed culture in a growing trust
- James Roach on how AI can and should drive "digital dignity" for staff and students
- James Goffin on strengthening stakeholder engagement across your trust's community
- Chloe Auty from SAMpeople, on practical ways to promote wellbeing and address mental health for your staff

I've been a director at Arbor for over ten years and, and having worked with countless MATs in that time, I think it's exciting and significant that we are holding these people-first conversations. I hope you finish this book full of insights and practical inspiration to take away and apply in your organisation.

All the best,

Philippa

Model not martyr: Three voices on flexible working



Dan Morrow
Trust Lead, Cornwall
Education Learning Trust



Secondary schools: Primary schools:

5 11

Location:
Cornwall

Flexible working became a statutory entitlement in 2003. 22 years on, we are far behind the curve as a sector.

Part of the reason is that a number of our leaders and staff aren't part of a culture where flexible working is normalised. And so we need to get to a place where decision-makers don't just understand that there is an entitlement, but are culturally aligned with and understanding of the benefits of making flexible work a reality. We've also got to change a culture of expecting sacrifice to be normalised because it's both unhealthy and also leads to some of the workload and wellbeing issues we're seeing in the sector generally. And I don't think the next generation of colleagues we're going to have will stand for it at all.

Too many leaders talk about why flexible working is going to be a problem. Very few seem to understand that actually, this is a massive opportunity to forefront wellbeing and create happy human beings, who then become productive and cohesive members of staff. With human resources, we have to absolutely focus on the word human first and not just look at it as a deployment of resources from a timetable point of view or indeed for how we want to get the best out of

people. Getting the best out of people means allowing them to be their best selves. And until we get into a space where culturally, leaders are on board with that, I think the transactional issues we find will always be the first thing that people talk around.


TimeTabling

The nature of schools, in particular secondary schools, tends to allow perfect to be the enemy of good. So when the timetabler is in charge, they will look and try to minimise split classes, try and work everything around the rigidity in the timetable. And yet each year, when we have sickness absence, when we have that lack of flexibility driving cultural issues in an organisation, the fact that it looks perfect on paper seems to trump the reality of the lived experience. That's what we need to move away from: "but these young people won't cope with having two teachers for science." In actuality, with the amount of cover and absence we've seen in the past, it's just an attempt to portray an inflexible approach to timetable as something that garners benefits for our young people, which it doesn't.

Language is critical. One of the first things I did was to encourage our timetablers to stop using the word "constraint". From a very technocratic point of view, this means there are fewer options for how we can find an optimal, efficient timetable. But also, you are literally telling human beings that their choices are a constraint on the organisation. This leads to a cultural creep around what inclusive practice is. Until we change that language, we're not forefronting a culture.

The biggest blocker is the myths and legends: the emotive responses, sometimes from parents or other staff members. And that ties into our misplaced focus on organisational design — whether it be in the timetable, in action planning, or when a staff meeting is — seems to trip always over the obvious and more rational, frankly, approach we should take to a cultural basis of organisational health. We are stuck sometimes in what I would say is a very paternalistic hierarchy in education, and we therefore expect people to fit with the model, as opposed to culturally seeing that the model needs to adjust to the people. It's about culture, it's mindset, it's historical, and it's clung to in a way which is often counterproductive and often goes back to that sense of process over people.

—
“The model needs to
adjust to the people”



Lisa Marriott
Chief People Officer,
Embark Federation



Secondary schools:

4

Location:

Derbyshire

Primary schools:

18

When it comes down to our flexible working policy, it isn't perfect. We're a relatively new trust that has grown rapidly, and so it's important for me to say at the outset: this is not a sleek, perfected strategy.

All of our schools joined us from very different starting points and our policy is legally compliant and inherited from the Local Authority. But what I most care about is the quality of the conversations that we're having and the culture we're creating: that's where the real work goes and the real difference is made. How do we make sure information is accessible? What messages are we sending? What are we role modeling? How do people know what they're entitled to? Because it is an entitlement. When I started, people might say: "Oh, you can't ask that here" about flexible working. I said, "You absolutely can ask. You might not get it, or you may not get exactly what you want — but you can certainly ask." We want to encourage really open, honest dialogue with people at every turn, and slowly, incrementally, your policy evolves from that. It's just an evolution: get going, get good. We are at the point now, that ask should be met with "how can we accommodate that".

“If you’ve got a leadership team which embraces flexibility and puts their people first, they will do it in every other area too”

We've got a school which has a job share in every single class. Our schools with the best staff survey results, best retention rates, the best outcomes, and the lowest sickness all support flexible working. It's no coincidence. And I know that the reason for this is because it's not just about flexibility, it's about the culture of that school. If you've got a leadership team which embraces flexibility and puts their people first, they will do it in every other area too, and I've seen that first-hand at Embark. Within the trust, one of our core values is family. I think that's quite a complicated core value, as an organisational one, as it can feel quite intangible. But the way our CEO talks about it is: you put your own family first. Because nobody should be going to work and putting their own family second. And flexible working is one of those places where we can really bring that to life.

We've got a full trust commitment to flexibility as one of our five key priorities from the staff survey this year. Our people function is built into the wider organisational risk conversations. Over the past six weeks, I've visited all 23 of our schools, having conversations around the people risk. And one of the core conversations is around flexibility. How many people have requested it recently? If it's none, why is it none?

Have you asked if anyone wants any flexibility? As I mentioned, it's all about evolving, and you do this by asking the right questions. If they have, I also collect positive stories and share them.

Another important thing about flexibility is recognising the different types. We've just come up to the resignation window, and I went through every resignation and went back and asked: why? We've turned three resignations into career breaks — three early-twenties staff who want to go travelling. We're retaining young people who actually want to teach in education. That's powerful.

The blockers? Very often, the blocker isn't flexibility. If a job share isn't working, for example, it might be down to the individual not being a great fit. Or if someone has a concern about a flexible working request, what you come to understand is that it's actually a concern about trust, or lack of visibility, or a performance concern. And we need to deal with those things separately, because they are separate issues.



Nicola Noble
Associate Headteacher,
Big Education Trust



Primary schools: 2
All-through schools: 1
Location: London

In the school that I predominantly work at — Surrey Square — 30% of our staff work flexibly. People ask us how we’ve achieved that, and we tell them we make it work because that’s what our staff need.

You might not always be able to give people exactly what they want, but by working in collaboration with people and thinking creatively, generally you can find a solution that works for you and for the organisation.

We have a trustwide policy, and I think it’s the communication around something being an entitlement is so important. And also about showing that flexibility is more than just about mothers returning to work. It’s more than just working fewer days. In education, we’re all very lucky with the holidays that we have. But you can only have those holidays *within* holiday time. So it’s also about: if your best friend’s getting married, why shouldn’t you be able to go to their wedding? Or your child’s sports day? We all look at the children at school whose parents don’t come to sports day and think, “Oh, those poor children.” We need to then be making sure that our staff are able to go and do those things to support their children.

“It’s our job to see how we can make that work, so that you can live your life outside of work and do all the things that give you joy and make up the person that you are.”

Flexibility is also about having curiosity. For instance, around a member of staff who’s repetitively late. Often, organisations will go down the route of disciplinary action instead of saying, “We notice you’re always late, what’s going on?” Getting curious means you might learn that he is a first-time dad struggling to get his children to nursery on time. If you can shift his start time, and make it work, then everybody is happier.

We’ve had people say that they intend to leave and do supply work because that gives them the flexibility they need. You have to ask: *What flexibility do you need?* One member of staff told me they’re in a band, and the gigs on Sunday sometimes mean they can’t be in on Monday. It’s our job to see how we can make that work, so that you can live your life outside of work and do all the things that give you joy and make up the person that you are. So then, actually, you bring your best self to work and the organisation retains incredible people. The first step is therefore an awareness exercise, making sure that your staff’s requests will be met with understanding, curiosity and creativity.

Part of this exercise is about encouraging staff to get in touch with what their needs are; we talk a lot about model, not martyr. So often in education, people put their own needs at the bottom of the pile. Ironically, in schools we teach children to prioritise their wellbeing. We must make sure our staff are practicing what they teach.

Retention at Surrey Square is 11.2 years. That’s an inner-city London school. I truly believe that is down to the fact that we really value individuals within the organisation, and flexible working is just one example of that. We talk in the sector about staff wellbeing being at an all-time crisis level. But actually, staff wellbeing in our staff survey is one of the top indicators, so the dots are there to be joined up and the benefits of a creative and curious flexible working approach are there to see.

What should your central team look like?



Mark Greatrex
CEO, Bellevue Place
Education Trust



Primary schools:

12

Location:

London &
Berkshire

This is a big question, but I think a good place to start is by defining the role of the trust and a role of the central team, which will always be unique to each organisation.

At Bellevue Place Education Trust (BPET), we've grown from being a collection of free schools through to 12 primary schools across London and Berkshire, with a view to growing to 24 schools. Our changing context and growth mean it's even more important that we are clear up amongst ourselves what role we ought to play.

I've always defined our role as oversight, not in the running of schools. Autonomy might not be the most fashionable word, but we've always functioned in an educational autonomy model, which allows our schools to shape themselves in a way that meets the needs of their communities. In some trusts, I've seen central teams have someone overseeing SEN, someone overseeing welfare, someone overseeing curriculum. At BPET, we have a Director of Education who oversees and monitors standards, and we also centralise our operational and finance side; this way we are watertight on all fronts whilst allowing schools to dedicate more time to education. We started off by appointing generals, then appointed a few

lieutenants and now we're slowly filling up the team with soldiers. While we grew as an organisation, the generals were doing quite a lot of soldier work for quite a while, but this has developed well structured systems for the team to develop further.

What did we centralise first?

We started with finance, as this just made sense to us as a new organisation. I believe finance is the first thing every trust has always got to get right, and quickly. Our Finance Director sets the budget and all invoices come through to the central team. We do a payment run once a week and only have one bank account across the trust, which we set up early to manage and take away risk, but also to allow the schools to still have access to the money and their budgets in the same way they ought to. We don't gag pool, but what we do is give schools the access to their funding in the way they want to. At a school level, we created a new role — 'Operations Managers' — which replaced our SBMs, as these didn't serve a financial function, which means everything finance is streamlined back to the centre. We've got a strong network of Operations Managers across our schools, who we try to bring together monthly virtually and two or three in-person meetings a year.

The second function we centralised was marketing, which might surprise some people, but we wanted all of our schools to be full with first choices (particularly as we started out as free schools). We're at 83% of first choices at the moment and 94% of our schools for September are going to be full, which we're delighted about, particularly with falling birth rates in London at primary level. Naturally, everything comes back to education provision being strong, but how you share the quality of that education provision division is important.

Next, we developed our education function at a central level. I'm not going to lead any of our schools and never have led any of our schools, but actually having someone who's the Director of Education who has that real, strong oversight across the schools is really powerful. Following this, we've been growing our operations team. We also do a fair bit of outsourcing consultants as well for different areas, be it specialist subjects or clerking service etc.

Next up, we'll be looking at getting in an HR or people person, and then onto estates. Our current growth plan is looking at how we grow to 24 schools. As it stands, we've got 12 people in our central team because we have 12 schools. The key to this slimmed down

“It’s our job as a central team to equip our staff with the tools they need to be effective in their own roles”

approach is having high quality outsourced providers, especially high quality procurement of these contracts.

Specialism vs centralisation

Sometimes, there can be a budget tension between specialism and centralisation, which we naturally ebb and flow between. We’ve had a number of really strong consultants who have come in and supported our subject leaders, predominantly in the core subjects we’re moving more towards. Almost 40% of our schools are outstanding; that means we’ve got a lot of brilliant staff whose expertise we should share and influence across our organisation, which led us to create what we call trust champions. We’ve got a trust champion for SEN and we think we’re going to move into some specialist subjects around our trust champions of our high quality leaders. Subject leaders in our schools actually have that breadth. It’s effectively like a TLR, plus that they have to then work across a group of other schools and some individuals are involved in our review cycle. Of course, there’s always a benefit of bringing in external consultants, but actually, we want to utilise, where possible, the high quality staff we’ve got in our schools.

Measuring the success of our central team

Our headteachers don’t ever complain that we’re doing the asset management strategy or IT for them; they just want it to work. And so we get the most feedback when a particular system isn’t working. However, I think it’s important to seek out more feedback where we can. We very actively promote our BPET provision survey, in which we survey our headteachers on all the things we offer, from our school improvement strategy, to our outsourced consultants, to how our FD and marketing team are performing. Not everyone likes the responses, but it keeps us

on our toes. I’d advocate that it works incredibly well, especially in terms of how it informs our plans for the following year.

Feedback also goes the other way, especially when thinking about what role the central team is serving. It’s important to determine what is appropriate for a CEO to deal with and what should be dealt with at more of a school-level, for example. I think there is always a temptation for schools to send something upwards if it’s challenging, for instance with people management, but we will always strongly recommend that these are dealt with by the appropriate line manager. Headteachers in particular can get nervous around putting their foot in it, which is understandable by recognising that we are their employer. But it’s our job as a central team to equip our staff with the tools they need to be effective in their own roles and have the authority and training to deal with things within the contexts of their schools, which comes back to why it’s so important to define your model up top.

Closing thoughts

MATs are evolving and, in doing so, increasingly take on more responsibility than local authorities do, in particular where we’re taking on underperforming schools from different areas. There needs to be that flexibility and freedom, because every locality is so different that the demands put on each trust vary. The common thread is that the more we can learn from each other about what works and, more critically, what doesn’t work, is absolutely brilliant.

Using AI to increase digital dignity at Inclusive MAT



James Roach
CEO, Inclusive MAT

INCLUSIVE | MAT

Primary schools:

3

Location:

Watford

At heart, I'm an enthusiastic tech user, and always have been. I'm the perfect age: I was in Year 2 when the first computer came into the classroom, and it just captured my curiosity all the way through. That's led me to always be interested in the latest thing and how it can help our schools and our students. At the moment, that's AI.

What's struck me more recently is that, certainly with our newer teachers, there isn't that same excitement and curiosity around tech. And I'm trying to drive that. I was a self-confessed former naughty boy at school, and computers were genuinely the hook that got me into teaching. As a primary school teacher, I know: curious children are engaged children. Not only that, but at Inclusive MAT, we've got 62 languages across just three schools in Hertfordshire, which isn't the norm. Hertfordshire is a very traditionally white British place. So for me, AI is really driving an uplift in what I'd call digital dignity.

It allows us to talk with our families, to communicate better, and not just through EAL, but with our SEND community, our neurodiverse staff. It's a real leveller. And I can absolutely see it chiming with our name, The Inclusive MAT. So of course, I'm really excited

about the opportunities it brings. In many ways, I've got to dampen my excitement because I want to run away with it and do all those unsafe things you're not supposed to do. Luckily, my COO keeps me grounded.

How are we thinking about implementation?

We didn't want AI to be a bolt-on. It's a thread that should follow throughout our ways of working as a trust. To get the wheels in motion, we built a working group that meets monthly. We throw in a problem and solve it together. It's one part excitement, one part addressing real, clear needs.

To find members of the group, we threw it open. We looked for staff who were new to the organisation or education and were bringing energy, openness, and curiosity. We put on sessions that anyone could come to. And it's absolutely not just about teachers. Interestingly, it was the office team and the site team that really leaned in, especially the site team, who had been feeling isolated. They wanted to see how AI could help connect them with wider networks.

We all know that AI is a bit of a Wild West right now with so many tools, all claiming to do amazing things. But it's about knowing what to use, when. Our working group is helping us to choose

those tools, so we know that if it's a presentation issue, we use this tool, for translation, we use that one. It's increasingly about picking what fits the need at that moment, not just picking the flashiest new tool.

Inclusivity and dignity at the heart

Some people worry AI takes away responsibility or agency. But ever the optimist, I think it *increases* our ability to have a more diverse staff team. We've got lots of languages across our schools. Sometimes you want someone with the cultural context, the mother tongue, but they might not have the grammatical English to write a formal letter. AI takes that barrier away. You get the authentic voice and the formal polish. That's powerful.

One of the tools we now use started with something really simple: a translation error. We had a child who, at the end of the term, asked us why we called him 'Abil Dad.' It turns out, on his enrolment form, his dad — who didn't speak English — had written "Abil's Dad" in the child's name field. So we'd been calling him the wrong name for two years. We took that problem back to the group and made a change. Now, we use Moat, a recording tool we were already using for verbal marking. When a child joins, we record them saying

their name. So if I'm taking the register, I can just click and hear them say it. No awkward moments. Simple, but huge in impact. And it gives back our students, staff and parents in the MAT community the dignity they ought to have.

We're now using tools that translate in near real-time, like Google Lens. Say that a parent comes in, we can hold a conversation without having to wait for interpreters. And with Arbor, parents can report absence in their own language, which gets translated and processed. That's time-saving and dignifying. You're not made to feel stupid for using your own language. Magma Maths is another one. Maths is a universal language, but removing that tiny layer of language friction with translation helps massively.

We're not perfect, but we're combining little tools in creative ways. But we also know to always check. We translated a message to parents once saying "the children are wet" (after playing in the rain). One language version translated it as "the children have drowned." Hilarious and terrifying. There should always be a human in the loop where you can get one.

Bringing others on board

Not everybody buys in straight away, because of instances like that. We started with a problem: recruitment takes forever. So we trialled AI, specifically Claude (a tool I really rate). We uploaded the job description and our criteria, asked it to prioritise real-life examples, and used it to shortlist. We didn't trust it fully at first, so my COO did it the traditional way alongside. We got the same result, and that was a great proofpoint to that team.

Since then, we've used it to generate tailored interview questions, and even personalised feedback for unsuccessful candidates. One of those people is an internal staff member, and we're now developing a support plan for them to succeed next time.

It's not perfect but it saves a huge amount of time and adds real precision. Interestingly, the human had rejected some candidates for short responses, whereas AI picked up the actual relevance in those short ones. So it's even revealed some of our unconscious biases.

A last piece of advice

My biggest achievement in education, genuinely, is convincing my very sensible COO that using AI isn't cheating. That it's worth asking: can this save time? Can this do it better? Can this make me more efficient?

If the answer to two of those is yes, then it's worth trying. Now she sees it as a supportive arm, not a threat. So my advice would be to get curious. Be playful. And go for it.

“Some people worry AI takes away responsibility or agency. But ever the optimist, I think it increases our ability to have a more diverse staff team.”

Many voices, one community: Strengthening stakeholder engagement in growing trusts

An interview with James Goffin,
Head of Communications at the
Confederation of School Trusts



James Goffin
Head of Communications, the
Confederation of School Trusts

James' role involves working with the media to share CST's message, overseeing publications and guidance materials, and leading CST's communications professional community. He has a background as a journalist and has also worked in communications for school trusts, both in-house and freelance, as well as roles in business, the NHS, and local government.



The whole purpose of stakeholder engagement and communication is about maximizing what you can do as an organisation. And that's about recognising that this affects *everyone* in the organisation. It's about really making sure that people know what your trust is about, and knowing that people externally know about that, but people internally know it as well. This helps you focus on the most important work, particularly at a time when there's so much change going on. It helps you know what to say no to, as well as what to say yes to.

What do you think makes a good, effective communication strategy or stakeholder management strategy at a trust?

The first thing is to have a strategy. And to have a strategy, you need to understand the difference between tactics and strategy. Trusts are doing great things: they have exciting intranets, they send postcards, produce a well-designed newsletter. But actually activity itself isn't the goal. Almost every trust has values; some of them are more lived than others, and that's the same with every type of organisation. I've worked in places where you get the mousemat with the five values on that no one ever looks at again. That's activity without a purpose. The goal is activity that makes a difference.

So how do you figure out what this is? You have to go back to the drawing board and ask: "what are we trying to achieve?" Look at the trust's overarching goals and look at your audiences: the communications strategy should bridge the gap between the two. Looking at your trust vision and strategic aims, the next step is to create a stakeholder matrix where

you identify people: how much influence do they have, how much interest do they have... and try to work out who are the people you need to keep informed, but who on a practical level won't do that much. Or who can make a lot of difference to what you're doing? Think about your staff, your students, your parents, but also your trustees, the government and the DfE. Plug those all in and begin to understand who's going to help you get to your goals. And from there, you can then work out what tactics will help you achieve that.

But if you start off saying something like "We need an intranet because other people have one," you're not going to end up with a good outcome. You're going to end up with something that sits there, costs money, and no one looks at. If you start from the beginning saying, "What are we trying to achieve? What will be useful to our staff, what will get us towards our goals?" Then you begin to do things which are actually strategic and meaningful, and get a much better return on your time.

Could you tell us the best way, in your view, for a trust to measure the effectiveness of any stakeholder strategy or communication strategy?

The first thing is to be realistic about your targets. It's very tempting to say: "We know we need to get more pupils through the door, so we should measure that." This leads you to set a target of how many students you get in Year 7 next year. But that's not a fair communications or marketing target, because that activity is not in your control. People are influenced by lots of other things: where they live, what the transport's like, where brothers and sisters have gone, what the Ofsted report of the school says. Your

“Activity itself isn’t the goal... The goal is activity that makes a difference”

communications work can make people more aware of the school, but you can’t assume that overrides everything else. So your targets should reflect the awareness piece: look at how many people come to an open evening or the number of people that react to your social media posts. Those are more reasonable targets to put around your communications and marketing activity.

It’s also important to review your targets. Have checkpoints where you take the time to consider whether something is working and realistic. Targets are guides, so be realistic and prepared for them to shift sometimes. We have pandemics, political changes, unpredictable weather — things that can come in and blow everything off course, so be aware you may need to flex. You also need to reflect the available resource: what you can achieve with a dedicated marketing team is going to be different to what you can achieve with someone doing it alongside other tasks, and the approach and expected outcomes needs to reflect that.

Could you give any advice or suggestions for tactics on how trusts can best engage with external partners, local authorities, regulators, and other civic partners?

A lot of this goes back to what I said before about having a stakeholder matrix to help you understand the different types of engagement and opportunities. If we take councils and MPs for example, these can be your community links. Most people in these roles, as much as we sometimes denigrate politicians as being evil and craven, in my experience, actually do want to make things better. We can disagree about how we do that, but their motivation is to make things better for their community. They also tend to know a lot of people. So they’re really useful to engage with, because they can connect you. If there are things you’re having issues with, they can often help you and connect you with the right people.

So, what I’d recommend with people like MPs and councillors, is to invite them in for a visit. It might be literally just to come and have a look around, particularly if you’ve got someone who’s new in post. Quite often MPs and councillors will be happy to speak to children about democracy and how it works, which can work as part of PHSE or a student council. They might come in to judge a debate competition or hand out prizes. There are lots of good ways of having that connection, where you’re then building a relationship. So if you do later have a query or need help — or if they’re getting pressure from parents about something — it starts the conversation off in a different place, because they already got that knowledge and engagement with you. That’s about being open, honest, and building that relationship up over a period of time.

Can you give one piece of advice on how to make sure that stakeholder management is really embedded in the culture and values of your trust?

Believe in them. People will sometimes come up with some values because they think they have to have some, or that they have to spell a word out, or be the initials of the trust. And actually, you end up with values that are just words floating around that don’t really relate to how the organisation thinks or feels. There’s an interesting concept that your values should be your only agenda items for every meeting, because actually, if it doesn’t fall under one of them, why are you doing it?

It’s about really living and believing in the values, because that’s what will make it come alive and resonate. Values can of course be aspirational when you’re trying to change culture, but they have to be sincere.

The other piece of advice is to remember that you are not your audience. It doesn’t matter what you like. You might like going on Twitter or LinkedIn, but if you’re trying to get to parents, that’s probably not the right place for them. You might like getting updates by email, but for estates staff who aren’t sitting in front of a computer all day, it might not be the best way of getting staff communications out. Always think about who your audience is, not what you happen to like. It’s really easy to get trapped into “this works for me, so we’re going to do it for everyone.”

How to manage change as your trust grows



Chris Foley
CEO, St Teresa of Calcutta
Catholic Academy Trust



Secondary schools:

4

Primary schools:

18

Location:

North West

When our trust started in 2017, five of the six initial schools were inadequate. That brought with it a raft of challenges, especially around building capacity for school improvement.

Our focus has always been on giving children the best possible experiences, so we had to work really hard to ramp up our improvement infrastructure over time.

Our context is different to many other academy trusts as over the last few years, Catholic dioceses have moved towards academisation. In January 2023, Bishop John Arnold made it clear he wanted all 220 or so Salford Diocesan schools to be in one of three Catholic trusts. So, while we may have started as what you might have called a ‘crisis trust’, we’re now on a path to grow to 68 schools across Bolton, Bury, Rochdale South and parts of Wigan.

Growth and credibility

Just because we’re a Catholic trust with the support of a bishop, it doesn’t mean growth has been easy; we’ve had to build credibility, especially given where we started, and I can now comfortably say this has been a success. We’re on a good streak with Ofsted and Catholic School Inspections, which helps when schools are deciding whether to join us.

Of course, we’ve seen resistance to our growth plan, which has really shaped how we communicate and operate. We’ve had to show schools that joining our trust is better than what they have now, whether that’s local authority provision or otherwise. The bishop might want all schools in a trust, but that doesn’t mean every school is ready to jump in. That’s why we’ve spent the last 12 months showing schools the benefits. And now, even outside of our growth plan, we’re seeing schools choosing to opt in because they can see the value. Although the national white paper on schools has been shelved, in a diocese, the bishop’s vision still drives academisation. We’ve deliberately paced our growth over a longer period (through to 2031 or 2032) because doing things right is more important than doing things quickly. Ultimately, there’s no point growing fast if you can’t sustain it.

It’s been a really challenging journey. In those early days, we were an academy trust born out of trauma. Now we’re seeing huge improvements in our “heritage schools”, including some really strong Ofsted outcomes and improved results. But the real work has been getting the culture right, alongside building systems and processes to become what I call a corporate education provider. Before I worked in education, I wasn’t always

a teacher. There’s a lot to learn from how organisations outside education function, particularly around structures and outcomes. In the Catholic sector, there’s sometimes been a hesitation to look outside, but we’ve leaned into that to improve lives.

Our four-pillar operating model

We’ve tried to build a relatively corporate infrastructure, based on four key functions: finance, information, operations, and performance. Delivering everything through those four areas has provided clarity for schools, governors, and our teams. It’s also allowed us to create an effective line management structure. What’s critical is that none of the four functions hold more weight than the others. Finance is a narrow but deep function; it ensures viability and compliance. Information is probably the most distinctive. We wanted to work with Arbor because our digital infrastructure is how we’ll transform children’s lives. That function also ensures message consistency and oversees communications, data services, admin, and IT. Operations looks after HR, estates, governance, all the usuals. Performance supports education but sits alongside the others. We recognise that domain experts (who aren’t necessarily educationalists) will still impact education outcomes.

“In the Catholic sector, there’s sometimes been a hesitation to look outside, but we’ve leaned into that to improve lives.”

Our four pillars are led by a CFO, CIO, COO, and leads for primary and secondary performance. That’s a full team of senior leaders. And I couldn’t prepare for growth without first having clarity on what structure growth would sit within. The Trust Board backed us in setting up that structure early, and now it’s starting to deliver.

Cultural leadership

We’re really fortunate as a Catholic organisation, as we know that Catholic social teaching is the bedrock of why we exist. Our job is to serve the common good, but also to make sure that we support the most vulnerable in society, so that underpins how we choose to act within those broad principles. We have our three core values of hope, courage and innovation, drawn from our patron St. Teresa, who challenged perceptions on how we treat the most vulnerable in the best possible way. We’ve then distilled those core values into what I would call key behaviours.

We’re really clear on behaviours that we expect and behaviours we will not tolerate. My view is that culture is always led by the leader of the organisation, wherever you sit within it. That means I talk about culture constantly, as I feel that as CEO, it’s important to define it and live it.

I believe to get every single person to subscribe to an organisational culture is a life’s work and it’s never, ever going to be entirely there, which means we need to drive culture from the top all of the time, to get as much reach as possible. All of our meetings start with the reflection on who we are and what we want to be. I point to our culture in decision making and I’m very, very upfront about what our culture is, particularly with the need to serve the most vulnerable and support the most disadvantaged. That manifests itself in, for example, how we choose to look at our funding model to support the smallest, least-funded schools. Those things can be uncomfortable. And I think we’ve kind of got used to making culture an area of discomfort because if we’re not uncomfortable about striving to serve the most vulnerable, we’re not doing the job properly.

When new schools join

By nature as a growing trust, we have new schools joining us regularly. But conversion isn’t just about signing papers: that bit’s easy. The harder and most important part is cultural integration. We start onboarding conversations with schools up to a year before they join. We talk about culture, communication, our mission, and what schools can expect. We’re always

honest as we know that saying “nothing will change” just isn’t true. So we’re clear about what’s different and what remains distinct.

In Catholic terms, we protect a school’s charism, its identity, while ensuring it aligns with the systems and responsibilities required by the trust, ESFA, and DfE. The onboarding process is currently led by our CIO which might seem unusual, but it makes sense: schools need a reliable, single point of contact during transition. That person can liaise across all four pillars and offer clarity. Before day one, we’ve already started budgeting, training, and system setup. The idea is that, from their first official day in the trust, teachers are free to focus on children, not systems.

We’ve learned a lot about timing and implementation, and what that operational conversion sweet spot looks like. You have to hit it, otherwise you store up problems. That’s why this year we’ve taken on some big tasks, such as bringing payroll and HR in-house, because waiting until we’re bigger would make those changes even harder. It’s about taking calculated risks now to prevent major headaches later. Our due diligence process has also evolved. We treat it as organisational housekeeping. Often, schools have all the right information, it’s just scattered. We help them bring it together, and

we’re getting better at identifying unique challenges each school may bring.

We’ve done well on systems, but we know cultural onboarding still needs work, particularly reaching staff beyond SLT. People like TAs and site staff are often the heart of a school, and making sure they feel part of the trust remains a challenge.

Perception and honesty

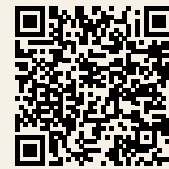
Growth isn’t just about adding schools, it’s about building something that lasts and can adapt to change. We need to be candid in education that the world around us is constantly changing, and we must adapt consistently to allow that to happen for the best of the students in our schools. For us, that means investing in structures which allow for change to happen while putting culture first.

We haven’t got everything perfect, but we’re clear on our purpose: to serve the most vulnerable and improve outcomes for all. With a strong structure, shared values, and a commitment to doing things properly — not just quickly — we’re building a trust that makes lives better. And that’s what matters most.

Thriving at work:

Promoting wellbeing and addressing mental health in your organisation

In July 2024, SAMpeople joined the Arbor School Management Suite. This article first featured in SAMpeople's eBook *The ultimate guide to MAT people strategy: Health, wellbeing and culture*.



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Chloe Auty
HR Consultant at
SAMpeople and FusionHR



According to the Indeed Work Wellbeing Report 2023, only 23% of UK workers are thriving, reporting high wellbeing at work. The education sector, in particular, faces mounting challenges, with leadership facing tight budgets and teachers under significant pressure. This raises an urgent question:

How can we support our teachers and leaders to promote wellbeing and tackle the causes of work-related mental health problems?

HSE statistics show work-related stress, depression or anxiety accounted for 17.1 million lost working days in 2022/23, with the education sector among the most affected. Prolonged stress can lead to burnout, poor engagement, and high turnover, impacting your organisation's culture. Prioritising wellbeing retains staff, reduces recruitment costs and fosters a positive working environment.

The Indeed Work Wellbeing Report 2023 suggests the top 3 factors driving work wellbeing are energy, belonging and trust. Collaborating with employees to develop a strategic wellbeing strategy, can make sure staff feel valued and heard, fostering energy, belonging and trust. Wellbeing was also highlighted as important to jobseekers, so making your wellbeing strategy available externally could help drive recruitment and strengthen your stance as an employer of choice.

What are the benefits of a wellbeing strategy?

- Evidences a commitment
- Increases engagement
- Improves workplace wellbeing
- Reduces absences
- Improves performance
- Embeds you as an employer of choice
- Better outcomes for children

Foundations of a successful wellbeing strategy

Involve employees

Consulting employees leads to a well-received approach that genuinely supports staff and improves engagement.

Consider an anonymous survey to encourage honesty and higher engagement. Running this annually tracks changes and provides fresh insights.

Develop a positive culture and promote organisational values

To align staff, it's essential to actively promote these values, reminding employees of the purpose behind their work. Open communication and transparency are key; fostering an open-door policy can help staff feel comfortable sharing concerns. The physical environment also plays a part — displaying diversity, inclusivity, and mental health resources visibly reinforces a supportive culture.

Finding time for team-building activities can be valuable. Simple activities, such as the Macmillan Coffee Morning, provides meaningful opportunities for staff to connect and strengthen relationships.

“The wellbeing of our teachers and leaders is not just a moral obligation, but a strategic necessity for the education sector’s sustainability.”

Conduct Stress Risk Assessments

You can use the HSE Management Standards to help conduct stress risk assessments. Once in place, employers must routinely check relevance and reissue as required.

Build your mental health policy

Policies give a consistent approach across organisations. Involving staff in policy development fosters a sense of inclusion and trust. Regular reviews make sure that support remains relevant and removes unused resources, swapping in more effective tools and support.

Provide mental health training

All employees can benefit from mental health training, supporting them to identify stressors, use strategies and techniques and set boundaries. Making sure that managers understand their role in supporting mental health – and when to refer to professional support – helps reduce the load on leadership teams.

Appoint Mental Health Champions

These people play a key role in fostering engagement, encouraging access to support and initiating conversations. Regular training provides them with clear goals, strategies and personal coping mechanisms for the role demands.

Top tip: When appointing a Mental Health Champion, consider the time demands or share the role to lighten the load and provide multiple support contacts for employees.

Clear promotion of available support

Effective ways of promotion include using an intranet, employee portals within HR systems, newsletters, or physical signage in staff areas. With clear communication, employees are more likely to engage, making sure that any investment in support provides real value.

Use an Employee Assistance Programme

An Employee Assistance Programme (EAP) assists employees with work related or personal problems. An EAP generally offers support such as:

- Cognitive Behavioural Therapy (CBT)
- Face-to-face or virtual counselling
- Access to blogs and podcasts,
- Wellbeing strategies
- Signposts to specific support for family and domestic matters financial debt management, legal rights bullying and harassment

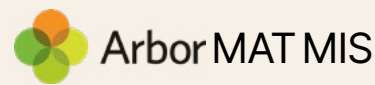
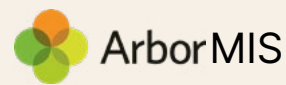
Be savvy with Occupational Health

Occupational health referrals can assist with work-related stress and mental health issues. They can suggest appropriate and effective support for employees, ensuring they can return to work supported.

The wellbeing of our teachers and leaders is not just a moral obligation, but a strategic necessity for the education sector’s sustainability. By fostering open communication, promoting clear policies and ensuring leadership is aligned with wellbeing goals, schools and MATs can build a thriving environment with teachers and leaders equipped to effectively handle challenges.

The Arbor School Management Suite

Arbor brings together top-rated, specialist systems to support operations across your trust. Build the central infrastructure you need to work efficiently, collaborate with your schools, and support them sustainably as you evolve.



Find out more at
www.arbor-education.com
Or get in touch directly with our team at
hello@arbor-education.com



Notes

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Got a question?
We'd love to hear
from you:...

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