

# Creating a Cohesive Trust

## Part 3

Trust growth: How to scale  
as one organisation, not many

# About Arbor

Arbor helps schools and MATs of all sizes work more easily and collaboratively, with intuitive tools designed to make a difference

## Arbor MIS

Arbor MIS gives schools the tools they need to work better today and be ready for tomorrow. Used by over 4,000 schools and 375 trusts across the country, it's the fastest growing MIS today.

## Arbor MIS for MATs and Groups

See the bigger picture with the only true MIS for MATs. More than just a dashboard, Arbor MIS for MATs is custom-built for better collaboration across your trust, with tools that make working together easier at every level.

# Contents

2	Introduction: Growing as one organisation, not many	24	Perfecting the art of change management at your trust
	<b>Phillippa De'Ath</b> , CRO at Arbor Education		<b>Matt Darsley</b> , Senior Partnership Manager at Arbor Education
6	Insights from MATs and schools across the country	28	How to build a people-first digital strategy, and why it matters
			<b>Lisa Hawker</b> , CIO at TransforMATive
10	'Walking the talk', and other strategies for creating a scalable organisational culture	32	"You're going to need a bigger boat!"
	<b>Danny Armitage</b> , Executive Director at Together Learning Trust		Why scale is a must for the future of MATs
			<b>Dave Noble</b> , Director and Principal at NSBL Associates Ltd
16	Growth, mergers, fluidity: The new landscape for MATs	36	Methodology
	<b>Mark Greatrex</b> , CEO at Bellevue Place Education Trust		
20	Beyond numbers — what can growth really mean?		
	<b>Hazel Pulley</b> , CEO at Excelsior MAT		

# Introduction: Growing as one organisation, not many



Got a question about how Arbor’s MAT MIS could work at your trust? Feel free to drop me a line at [phillippa@arbor-education.com](mailto:phillippa@arbor-education.com), or give our team a call on 0208 050 1028. I’d love to hear any thoughts, comments or questions you have after reading this book!

<50%

of all LA maintained schools expected to be part of a MAT by 2030

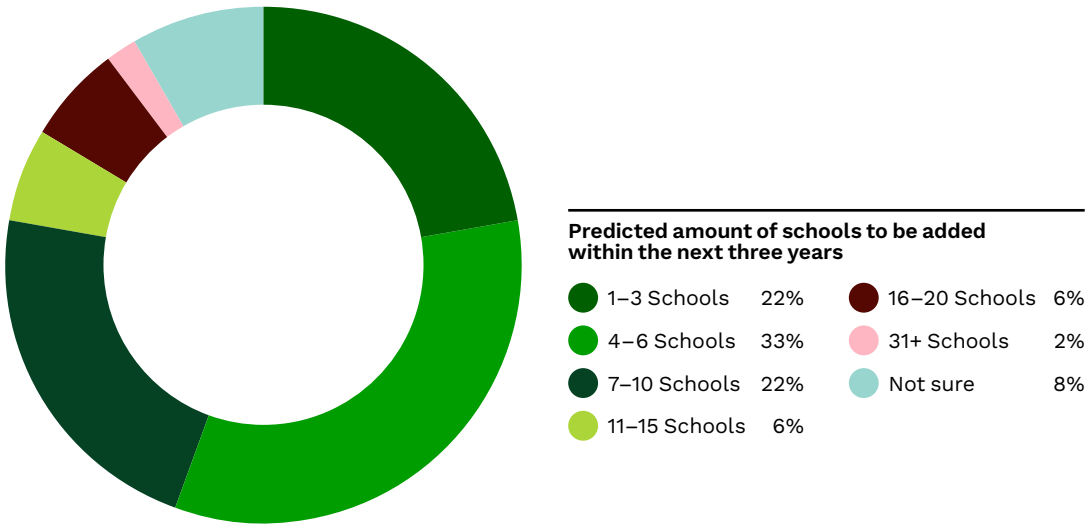
In March 2022, the government released the schools white paper, which revealed plans for all schools to be part of “strong” MATs by 2030. Recent political change means the bill has now taken a back seat, but with many MATs already intending to grow, the scene has been set for a critical few years in the academisation journey.

### Academisation: where do schools and MATs currently stand?

With many trusts now set on growth, we wanted to explore if the expectations of MAT leaders aligned with the sentiment of LA maintained schools.

In September 2022, we surveyed 108 trust leaders and 244 members of SLT in LA maintained schools from around the country to get a sense of the national picture.

We found that **less than half of all LA maintained schools expected to be part of a MAT by 2030**. Many cited political uncertainty, though the majority of respondents said their negative feelings towards academisation were focused on loss of autonomy, community and identity. Schools in our survey also quoted their lack of need for support, especially when they were already “economically viable and have good results.” Those that do expect to join a MAT were still largely negative about the prospect, with many simply saying “we have no choice.”



Despite this response from schools, **not one respondent in our survey of MAT leaders thought that their trust would add zero schools in the next three years**, with most expecting to grow by either 4–6 schools (33%), 7–10 schools (22%) or 1–3 schools (22%). 2% of respondents expected to grow by over 31 schools. This was matched by the general consensus that “schools joining is always positive”, with many participants referring to how growth would allow their trust to “make a difference to as many lives as possible.”

### Bridging the gap in expectations between schools and MATs

The discrepancy between the way schools and trust leaders view academisation is clear. With the majority (59%) of respondents in our survey of MAT leaders saying that their preferred method of growth was through acquiring new schools, there is work to be done on changing the perception of what joining a MAT can truly mean. This is especially pertinent for MATs who want to make sure they grow as a cohesive trust with a strong culture, rather than taking on schools simply to remain financially viable.

Political uncertainty aside, **how can MAT leaders win over schools who are reluctant to academise?** And, as trusts increasingly grow, how can they make sure that they do so sustainably and as one organisation, not many?

59%

of MAT leaders said their preferred method of growth was through acquiring new schools

We hope you will find some answers to these questions in this book, which features the thoughts of six MAT leaders and experts on growth, and what this means for schools and trusts looking to the future.

#### **Hear from the experts**

The first piece in our book, comes from Together Learning Trust on whether you can be a strong trust without a distinctive culture, and Excelsior MAT on why the growth of MATs should be judged by its breadth of innovation as well its increase in pupil numbers. This is followed by insights from Bellevue Place Education Trust, which explores why fluidity and mergers are central to the future MAT landscape. We then switch our focus to change management, with Matt Darsley sharing best practices when it comes to system change, drawing on his experience of working with MATs of all shapes and sizes. You'll then hear from Lisa Hawker, CIO at TransforMATive, on how to build a scalable, people-first digital strategy. Finally, Dave Noble, Director at NSBL Associates, explores how and why MATs need to scale in order to match their corporate and governance responsibilities.

I've been Arbor's CRO for nine years and, as well as having worked with countless MATs in that time, we've all seen a lot of change in the education space. I hope this book provides both insight and

practical takeaways in a time of continued disruption — and that it sheds some light on how other leaders in the community are facing these challenges.

In this book, we've also put together some of the comments and perspectives from the respondents of both of our surveys, to share not just the common themes but the more divisive insights in order to inspire conversation at your trust. We'd love to see where you stand in this discussion — join the debate on social media using the hashtag [#CohesiveMATs](#).

I look forward to hearing your thoughts.

All the best,

Phillippa



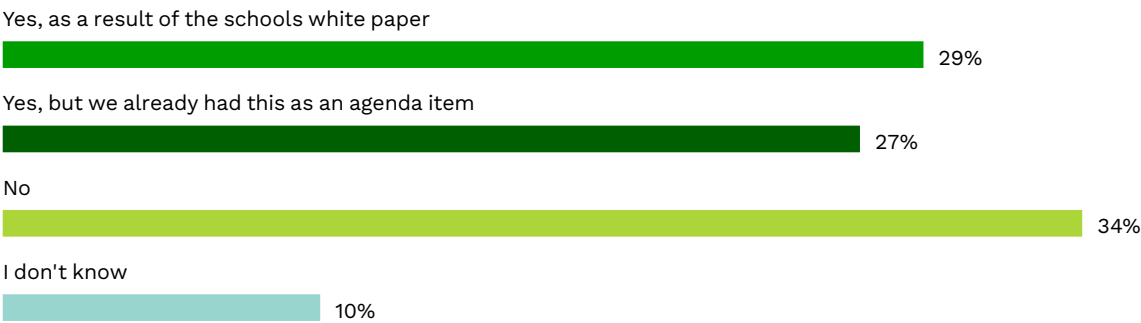
**Phillippa De'Ath**  
CRO at Arbor Education

# Insights from MATs and schools across the country

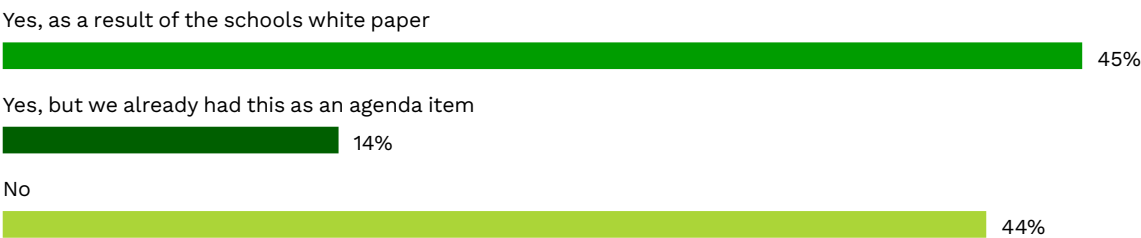
We surveyed 108 MAT leaders and 244 LA maintained SLT to find out what they thought about trust growth, academisation and culture. Hear what they had to say below, and get involved in the debate by using the hashtag [#CohesiveMATs](#).

## The expectation to grow

**We asked LA maintained school SLT if academisation is an agenda point at their governing board meetings**

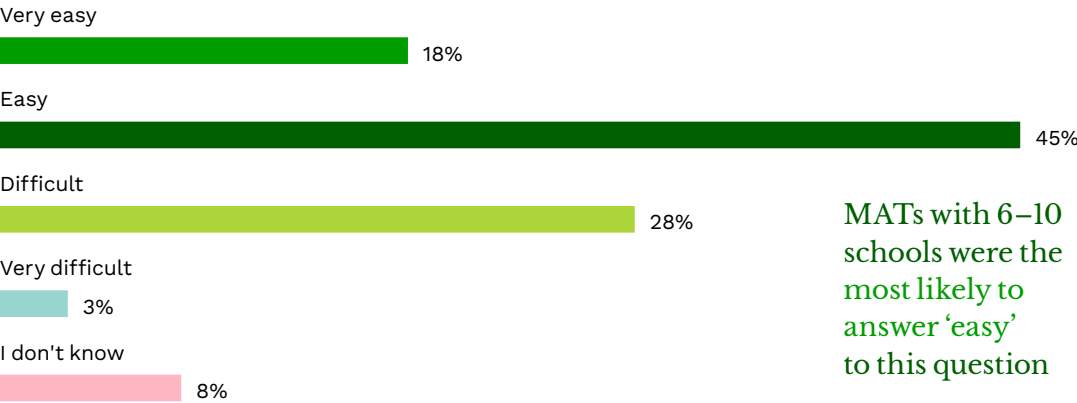


**We asked LA maintained school SLT if they expected their school to be part of a MAT by 2030**

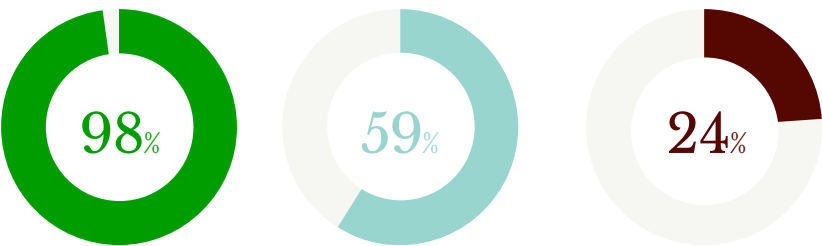


## Growing cohesively

**We asked MAT Leaders how easy they thought it would be to retain the same culture across their trust as they grow, leading to very split opinions:**



MATs with 6–10 schools were the most likely to answer ‘easy’ to this question



98% of MAT leaders said it was important that their schools all use the same MIS

59% of MAT leaders said that taking on new schools would be their preferred method of growth.

A further 24% said that merging in some way with another trust would be their first choice, though indicated that merging with a trust bigger than their own was less favourable

When looking at their central teams over the next three years, MAT leaders said that they would most likely grow by Finance and School Improvement staff

Insights from MATs and schools across the country

The schools white paper, released in March 2022, has an uncertain future while other political issues are given priority. And yet, it clearly set an expectation that schools should be thinking about academisation — an expectation which is unlikely to subside.

We asked both LA Maintained school SLT and MAT Leaders what impact they thought the expectations set out in the white paper would have on their school or trust.

More than 1 in 3 LA maintained school SLT said the white paper would have a fairly or very negative impact on their trust.

“We will lose our independence to make our own decisions around finances and curriculum.”

“We are an outstanding school.”

“The village has little else other than the school to bind it together.”

“We are a church school so limited in our choice of MAT.”

“As a small school, we would be a financial burden to any MAT.”

“Only having "Strong MATs" will make the education landscape homogenous and will negatively affect outcome for youngsters who are struggling in a mainstream setting.”

“We have concerns that we would not have a voice in a large MAT.”

Others were on the fence

“The ability to share resources and expertise. However, the difficulty will be finding a MAT that is not too corporate and which allows schools a certain level of autonomy and to retain their identity.”

“There are so many ways this can play out in the next 7 years. I have no way of knowing yet whether or not the outcome — if this remains policy — will benefit my school or not.”

Only 18% of LA Maintained School SLT said the white paper would have a fairly or very positive impact on their trust

“It could be a really good opportunity to upgrade a lot of the antiquated operating systems currently used in school.”

“Higher stakes accountability and school improvement opportunities.”

“It will allow us to collaborate more formally and hopefully support school improvement, CPD, sharing of good practice and consider any appropriate economies of scale.”

On the contrary, 78% of MAT leaders said the impact of the white paper would be fairly or very positive on their MAT

“Overall improvement in standards across the sector through stronger governance, MAT to MAT support and collaboration.”

“Growth is essential for us to provide a sustainable central function.”

“With such growth we are looking to impact upon more children, families and communities— which is our vision.”



# “Walking the talk”, and other strategies for creating a scalable organisational culture



**Danny Armitage**  
Executive Director at  
Together learning Trust

## Factfile

Number of pupils:

5,500

Number of schools:

3 primary  
3 secondary

Location:

West  
Yorkshire

Danny is Executive Director for Together Learning Trust, focusing primarily on Behaviour, Culture and Safeguarding across all trust schools. Danny is committed to ensuring all trust schools are exceptional places to work and learn and that staff and pupils are happy, safe and thriving. In his role, Danny has the privilege of helping shape organisational culture and working with leaders and staff to drive strategy which creates positive change. Danny joined the Together Learning Trust in September 2021 initially as Director of Business and Operations, supporting the development of the central team and embedding key services to support all schools. Danny has worked in a range of secondary school senior leadership positions, up to Deputy Headship. In his time as a school senior leader, Danny led on a range of areas, including: Pastoral Care, Behaviour Management, Safeguarding, Health and Safety, PFI and Facilities Management, Primary Transition (KS2-KS3), Stakeholder Engagement, Community Cohesion, and Performance Management.

I am a huge advocate of the power of organisational culture, but without an effective strategy, the ‘how’, we won’t achieve what we set out to, or take our people with us.

Whenever the discussion involves culture, I always like to revisit what culture actually is — ‘a shared set of beliefs and values established by leaders, effectively communicated and reinforced through action which shapes the mindset and behaviours of stakeholders’. Truly understanding and embracing culture as something you can see and feel, something which permeates the whole organisation as opposed to just a slogan or vision statement, is critical.

This is where culture and strategy work hand in hand. In Creating a Cohesive Trust Part 1, I suggested that culture and strategy were inextricably linked, as culture is driven through well planned action not just well intended words. I recently saw an online blog which had taken the famous Peter Drucker quote “culture eats strategy for breakfast” and morphed it into “culture and strategy should have breakfast together”. This perfectly exemplifies my point. I am a huge advocate of the power of organisational culture, but without an effective strategy, the ‘how’, we won’t achieve what we set out to, or take our people with us.

As multi academy trusts (MATs) look to grow, and schools consider academisation, it’s important to keep culture at the forefront of the discussion. We have recently welcomed another secondary school into our trust. The school has fabulous potential and brilliant people, but had lost its way. As such, the choice of MAT was critical: we had to be the right fit for them to ensure the necessary developments and long term stability. Similarly, we as a trust had to be sure that we understood the school community and that they were invested in the Together Learning Trust way. Only then could we collectively deliver an exceptional experience for the pupils of the school.

Bringing an additional 1800 young people and 200 staff into an organisation is no small feat. For me, one of the great challenges for a MAT, particularly those moving from ‘start up’ to ‘scale-up’, is staying true to our founding vision whilst adapting to the inevitable changes that growth brings. This is exactly the position we are in. Our founding five schools all played a significant role in developing and embedding our culture across the trust. However as we grow, we must ensure that the culture and beliefs which have served us so well to date are not lost in the challenges of expansion. I believe the link to strategy comes back when a trust is thinking

“Walking the talk”, and other strategies for creating a scalable organisational culture

about how to create a scalable organisational culture, and I’ve dipped into just some of these strategies in this piece.

Don’t be an imposter

When coaching individuals through the recruitment process, I often talk about the need to avoid being an imposter. In other words, the importance of being true to yourself, what you stand for and what you will bring to the role. At times, this may see you miss out on a role but it prevents one of two things subsequently happening:

Having to maintain the pretence of the interview process throughout every working day, a draining and potentially debilitating charade that can cause deep unhappiness

Immediately becoming at odds with your new employer, who believed they were getting a very different character from the one they hire

Either way, not a scenario which is likely to bring out the best in the individual or organisation. This idea can also be extended to the growth of an organisation such as a MAT. I believe that as part of their growth strategy, MATs must be clear on their culture. We must be strong and courageous in our dialogue with potential partners so they are clear

what joining your MAT looks like and feels like, the beliefs and behaviours which underpin everything we do and which have already delivered success. In a period where growth is a consideration for many in our sector, we should still stay true to ourselves. Becoming an imposter for the sake of growth will almost certainly prevent the harmonious joining of school and trust in the medium to long term, thus diluting the hugely positive impact this partnership can have on our communities.

Rigorous and effective recruitment

The idea of being clear and concise about who we are and what we do extends to our recruitment. From advert to interview process, we need to be explicit about our culture and what working for our MAT means. Whilst as leaders we do not want to find ourselves with an imposter, nor should our recruitment process lead to any individual being surprised or disappointed when they arrive with us. From the moment they engage with us, they should be clear what working for our MAT will be like and why. Recruitment within the sector is challenging at present, but sometimes it is also important to remember, for the sake of our schools, the best decision sometimes may be not to appoint. Appointing the right, high quality

people who understand and embrace our culture, will ultimately support current and future growth opportunities, whilst also delivering success in the classroom.

Talent development

If, like us, you already have incredible people who champion your mission then it is vital you have the mechanisms to identify, develop and manage such talent. Whilst the recruitment of external colleagues provides fresh ideas and impetus, there are few greater feelings in leadership than seeing your own colleagues thrive and grow. As executive leaders, we can sometimes be a step removed from day to day school life. Our role is that of ‘hero-maker’, ensuring that our school-based colleagues have the systems, strategies, qualities and confidence to do an exceptional job for their communities every day. At Together Learning Trust that is why our staff-first approach is so critical.

To reiterate, staff-first does not mean pupils second, on the contrary. By ensuring we have the best people who are highly invested, well trained and supported by robust and effective systems and structures, the people who benefit most are our pupils. That is why a high quality talent development and management program is vital. These are

high performing individuals who already believe in what we do and are delivering our vision, so our responsibility is to provide them with the support, guidance and opportunities to make an even greater impact.

For me, leadership development is particularly important. As a Professional Partner of the Education Exchange, an organisation set up to drive achievement, address disadvantage and raise aspirations, through the power of professional generosity and friendship, I’ve had the privilege of working with colleagues from another trust who have developed an outstanding leadership development program, which is open to staff of all levels. This provides staff with the opportunity to develop their skills and experience whilst being supported by experienced colleagues. As a trust grows, it is important to nurture the talent within the organisation, both for the individual, but also to provide additional capacity and superb succession planning. Know where your talent is and ensure you have a clear strategy for the development and management of these individuals, as they will help power your growth whilst remaining true to your organisational culture.



I was recently posed the question, can you truly be a strong family of schools without a strong and distinctive culture? In my opinion the answer is no.

Communication, communication, communication

Our school leaders are the key transmitters of culture. They connect the vision and aspirations of the MAT to the everyday experience of our staff and pupils. By modelling open, honest, transparent and clear lines of communication from the central team to our schools, we ensure that communication at individual school level is equally powerful, meaning that staff across the trust remain aware of and committed to our shared vision and values.

As MATS grow, there is a risk that without effective communication, our message becomes diluted and individual schools begin to develop their own microcultures which may not align to our vision and strategic aims. This splintering of organisational culture can have a profound impact on the effectiveness of our family of schools. This, firstly, is not a criticism of school leaders, more a reflection that, as leaders, they will rightly step in to fill any void they feel exists in culture and strategy to make their schools the best they can be. As executive leaders, we must ensure no void exists or develops and we will do this through regular and effective communication. Secondly, this

is not about removing the history and traditions of individual schools. Our schools all have their own distinct heritage which we recognise and celebrate and which we are keen to retain. Instead, it is about remaining true to the founding principles of our trust and the agreed framework under which we will all work to ensure exceptional performance in all areas.

By modelling a transparent and effective communication culture, we equip school leaders to operate in the same way, to own their school and ensure that the correct messages, systems and strategies permeate our whole organisation, constantly revisiting ‘the why’ so colleagues remain invested in the collective effort.

Walk the talk

Credibility as a leader is an absolute must and, particularly during the early growth phase, getting into schools and ‘walking the talk’ is essential. Of course, we must empower our school teams to deliver excellence every day, but as an executive function, how can we truly lead without being able to model the behaviours and strategies we would like our colleagues to use? We have found this particularly powerful when welcoming a new school into the trust.

One such school had been left a bit bruised by a damaging, yet accurate, Ofsted inspection; staff lacked confidence, and pupils weren’t routinely provided with the challenge and opportunities we would want to see. One of the most powerful tools we used as leaders was to roll our sleeves up and get involved. Show first-hand the culture we want to foster and the strategies we will use to get there.

This hands-on approach not only demonstrated our absolute investment in the school community, but over time it allowed the school staff and leaders to retake ownership of their school. It is this ownership which is vital to growth. For the executive team to be in just one of our schools indefinitely is unsustainable. However, by providing that positive example and helping staff and leaders reestablish themselves, we move to the important phase of ownership rather than followship. When your school teams are ‘owning it’ under the overarching beliefs, values and strategic aims of the trust, then growth will be both sustainable and most importantly, have the positive impact we intend on the pupils in our care.

I was recently posed the question, can you truly be a strong family of schools without a strong and distinctive culture? In my opinion the answer is no. A strong culture which clearly defines our ‘why’ and provides the framework to deliver is exceptionally important. As people, we all want to feel a sense of belonging, to be part of something and to feel that we have a purpose and value. Organisational culture, done well, provides this environment and enables both high performance and the opportunity to grow your organisation for the greater good.

# Growth, mergers, fluidity: The new landscape for MATs



**Mark Greatrex**  
CEO at Bellevue Place  
Education Trust

Mark is the Chief Executive of Bellevue Place Education Trust (BPET). BPET is responsible for educating over 3,000 pupils, supported by 450 staff.

Mark has extensive experience in the academy sector, starting in the Department for Education in 2004. Mark has subsequently held senior roles in three multi academy trusts, driving growth in the first (from 6 to 35 schools) and leading operations teams. BPET is the first trust he has led, for over seven years now, with all schools judged to be Good or Better by OfSTED at their last inspection; three being Outstanding.

## Factfile

Number of pupils:

**3,000**

Number of schools:

**9 schools**

Location:

**London &  
Berkshire**

I would personally advocate for more fluidity in the MAT landscape — more collaboration, more movement, and less protectionism

These are interesting times for MATs. All but the largest are faced with the challenge of growth.

Growing our trust has always been an integral part of our vision at Bellevue Place — and we are certainly not alone in that. At the same time, I believe that all but the largest academy trusts need to be a lot bigger than they currently are, and a lot bigger than they are aiming to be. If our goal as trusts is ultimately to replace the role of Local Authorities, then most MATs should be seeking to support anywhere between 60 and 400 schools. This might seem like a bold aim but, as a collective, we've got to think very differently about what MATs should and will look like; replication of the Local Authority function is just the starting point.

Local Authorities do many things well, such as governance support, planning for school places, safeguarding duty or simply advocating and representing localised sentiment. In my view, we should be aiming to better that communal aspect of procuring and provide the best outcomes for children, be this in hubs of schools or large, localised trusts. MATs have an advantage in that they are professionalising recruitment, budget control, safeguarding, educational aspiration, and innovation. There's more room for career

development and truly harnessing the untapped expertise of those who have hit the glass ceiling as headteachers and aspire to extend their impact even further.

As the majority of trusts are small, we're yet to fully realise the benefits that widespread academisation can offer. MATs have huge strength in their drive for educational excellence which, coupled with agility, is where their record is unrivalled. It's an exciting prospect that as we get bigger, and as other trusts do the same, we can offer this communal support educational improvement, and more opportunities for children and staff. At the moment, these are spread too thinly.

Years ago, I visited the rural primary school which I attended as a child and, whilst there, recommended that they join forces with the other rural schools in the area, as there were about 400 pupils across six schools. The sticking point comes when six schools realise that, for this to work fully, there can only be one Headteacher. While there are always other top jobs, self-preservation can play a role in blocking the opportunities of coming together, be this on a small scale or in a merger/acquisition between two big and well-established MATs. If we were all solely driven by the improvement of education

Growth, mergers, fluidity:  
The new landscape for MATs

provision for children, then this wouldn't be an issue, but to believe otherwise is naive and an unrealistic view of human nature.

Having said that, I would personally advocate for more fluidity in the MAT landscape — more collaboration, more movement, and less protectionism. I mean this in terms of roles and internal school structures, but also for when trusts hold on to schools, even when it is clear that it isn't the right fit. I hope to see a future where if a school has been in a MAT for three or four years with no evident improvement, the central team and trustees should put their hands up and say, 'perhaps you'd be a better fit within X trust.' In the current landscape, trusts only relinquish control when told to do so, because the culture of our system is not yet mature enough to acknowledge either failure or stagnation.

We must remember that a school joining a trust is not an end, but a beginning. Whilst I advocate for bigger MATs, trusts should not grow for growth's sake or grow as fast as they can, because it is the schools who will suffer. Trusts must be held accountable for the improvements promised. The American charter model reflects this idea fairly well, where every five years, they have to argue why they are still strong enough to continue supporting the school, to renew their charter to run the school. There's no shame in acknowledging that something hasn't worked out, and encouraging fluidity between MATs should support this inter-trust culture.

In this same vein, I think an increased number of mergers is an absolute must. At the moment, all trusts seem to be growing or aiming to grow by a steady

handful of schools at a time, but real change will happen when we start to embrace mergers, as this is where we can truly take advantage of the benefits that MATs have to offer. I do believe we'll get to a point of about 450 MATs, which is a significant change from 2500+ at the moment.

It comes back to my earlier point of self-preservation and being steadfast in vision and values; after building up an identity, this is an understandable blocker for many MATs. We also have to be clear on the MAT structures of support, being the best for the MAT role and not trying to replicate school structure at MAT level.

But I am always looking at the end goal, and firmly believe that merging creates better opportunities for children, which is our collective aim. If the culture is ultimately educational improvement, then every MAT (in theory) should have the same metrics of success. Self-reflection and honesty, where a MAT has perhaps lost their way, could therefore be truly beneficial. There is no shame in merging, changing and resetting direction if the outcomes for learners need to be improved. Mergers or letting schools move to another trust seem to be thought of as an admission that the initial plan has not succeeded, but this is not the way they should be viewed. These aren't a divergence from the original goals or a failure, rather an opportunity to do the right thing for learners.

The last element of the 'self-preservation' perspective comes down to people and autonomy. As trust leaders, we have to be certain that we are offering real opportunities to those the MAT serves — be that learners, staff, or the wider community. What

Believing that a trust name or logo deployed throughout a school will stimulate improvement is an illusion; real change is strategic and collaborative, driven by professionals empowered in each school.

does the school look like and how does it meet these disparate needs?

Of course, schools are worried about their autonomy in joining a MAT — and this is a big issue. Our approach at Bellevue Place is to pitch things differently. We want schools to have their own brand. We want our schools to be high-performing, meeting the needs of the community they serve, whatever that looks like. This percolates down to the curriculum and the way it is taught. We want schools to have a unique selling point in how they develop, organise and offer high quality education provision. We want school staff to have ownership of their roles, be that the headteacher, class teacher, cleaner, office manager, TAs... our role as a trust is to drive forward and create an environment where we can inspire high achievement, with effective monitoring, challenge and support. But ownership must be at local level in order to get real high-quality provision — because the individuals at each school know the local context best.

My hope is that MATs evolve to offer the autonomy which is currently enjoyed quite significantly in the Local Authority sector. Trusts which prioritise their overarching brand, rather than helping schools to nurture and cultivate their

own, have good intentions, but miss what the school means to its local community. It depersonalises it, risking a barrier between community and school. We don't want to be monolithic: we want to have our eyes opened to things we haven't thought about, and then devolve the autonomy to drive it. Believing that a trust name or logo deployed throughout a school will stimulate improvement is an illusion; real change is strategic and collaborative, driven by professionals empowered in each school.

For me, the brand of a trust is irretrievably intertwined with the strength of the provision it offers. When seen through this lens, mergers, giving schools autonomy, or being held properly accountable for the success of schools are not frightening buzzwords; rather, they are methods for creating a fluid MAT landscape that can offer children across the country a real opportunity to succeed.



# Beyond numbers — what can growth really mean?



**Hazel Pulley**  
CEO at Excelsior MAT

## Factfile

Number of pupils:

**2,356**

Number of schools:

**6 schools**

Location:

**Birmingham**

Hazel became the Headteacher of Parkfield Community School in September 2008, only to relinquish the role as the school grew from a SAT to a MAT, Excelsior, in 2017. Parkfield was the fifth headship in her career of working within four local authorities, all based in areas of serious deprivation and extreme challenge. Her headships have involved her in working with strategists in Education Action Zones (EAZs), Ofsted, LAs, DfE, SIP teams, and becoming Chair of Multi Agency representatives r.e. Prevention of FGM for the Home Office and Chair of Birmingham Against FGM.

Presently, she has been working with Danish HTs and LA leaders to facilitate their thinking around academisation and has recently designed a Framework and Review for Disadvantaged Pupils available to all schools, building on the great work by Marc Rowland.

We've created an aspirational culture within the trust, which makes it an exciting place to be, wherever you sit within that trust structure.

At Excelsior, we've had a varied pattern of growth in our journey so far. Some schools have approached us, others have been introduced to our team by the DfE — but our attitude has remained the same. We are, of course, driven by our vision and values, yet we also recognise that trusts must be adaptable as to the autonomy or alignment they're expecting from potential schools.

The facilitation of a two-way dialogue between trust and school is crucial from the offset, in order to find out how you are going to adapt to one another. It's also paramount that the trust is clear how it will move forward as one whole, while giving each of their schools clarity on how they are going to support them in their individual needs. From our own due diligence, we can build up a picture of what a school might require to improve and what they want from joining our trust, as well as how we are going to deliver that.

Naturally, schools are apprehensive about academisation and are largely troubled by three overarching areas: autonomy, finance and governance. A strong trust, and the benefits that come with it, are, however, defined by these very elements: strong governance, financial stability and clear direction. In these instances, it is clear that trusts

need to flip the dialogue. We all know that trusts want to grow and move forward as one organisation. But how can we show to schools that this is an opportunity for positive change, even if they are already a 'good' school? How can we encourage that aspirational mindset? The benefit of the trust to the school and the school to the trust should be intrinsically linked.

### People — the right place to start

We always strive to get the right people in the right seats, and watch these grow into bigger seats. This channels aspiration because we are encouraging talent to join, stay and progress within one organisation. For instance, our Maths or English team leaders get together and raise expectations amongst themselves. Working on your own, within one school, that doesn't happen as much. The idea that we can build teams, which can in turn help other schools move forward, is one that appeals to both us as a trust, but also the staff we have, matched by our inherent focus on CPD and wellbeing. That all trickles down to the children, which is why we are doing it. The end goal is always to enhance children's experiences across the city and beyond.

Operationally, you can do this even better with economies of scale, which releases the staff to be able to do all of these exciting things and have the

facilities within the schools to do it. It's reflected in our low staff churn, so there's also a retention piece there. When we have a new role available within the trust, it first goes out to our own schools. There's always a focus on developing our existing staff. It's not always a promotion; we also have opportunities for staff to develop their own studies, qualifications, teamwork and working with our specialist staff. We've created an aspirational culture within the trust, which makes it an exciting place to be, wherever you sit within that trust structure.

Having a cohesive culture across the staff, particularly around wellbeing, is one of the things we focus on intentionally and strategically. We've worked on creating and designing cultures that we want in the trust and in each school, using specific tools to do so. We've created a wellbeing area on our website where we support staff in certain areas and we measure happiness on a weekly basis using a specific tool. Culture and looking after our staff wellbeing is very high on our agenda because we absolutely recognise that if you've got happy staff, they're going to produce better results for you. It's intentional, not by chance.

And when a new school joins, the whole team becomes involved. For me, it's

about the personification of the vision, especially as we're so passionate about our goals and values, and how we portray them. We take care with the words we use. For example, we use the word 'welcoming' into our trust, rather than 'taking'. We really listen to the staff. We talk to the parents, multiple times. And we make sure that our communication strategy is personal, meaningful and authentic. All of our central team members are very visible and approachable — and we mean what we say.

In one school, for example, the staff room was in dire need of some TLC, so it was the first thing we focused on and contributed to that school, because we wanted that message of staff being valued to be loud and sincere.

**What does growth really mean?**

We have a ten year plan, which we're three years into. The plan for the next three year is to grow by four+ schools and be known nationally for innovative education. We've invested to grow in our core team, which is really bearing fruit now. But our big, hairy, audacious goal is to be world famous as an innovative trust. It's bold and ambitious, however, it better captures our idea of growth, which isn't strictly a numerical judgement.

Having schools come to you in their droves is fantastic, and a strong metric of success as it means you can impact more lives, but we also want to be growing the impact we have on the children that come through our schools.

Having schools come to you in their droves is fantastic, and a strong metric of success as it means you can impact more lives, but we also want to be growing the impact we have on the children that come through our schools.

Innovation is an easy word to throw around, but we've already begun to put the substance and create a real culture behind it. At the end of every year, we give an opportunity to all our schools to bid for an innovative project they want to bring into their school. Already we have a Young Engineer's Academy, a TV studio, radio station, two art studios with art teachers, a VR room... And what we love about this programme is that it's organic and based on each school's individual ideas. At the same time, the children across the whole trust benefit from and have access to these facilities, which is the perfect summarisation of how schools can positively impact one another.

Our approach to curriculum also reflects our mindset of innovative growth. It's individual for each school, where the school can fit the contents that suits them into our overarching design. We've also looked at supporting SEND children by providing schools with the money to develop the use of IT for SEND children. The idea is that these

are almost like research projects, with funding attached, with a view to improving provision across all of our schools.

**The change in mindset**

By growing culturally, and working with each of our schools individually to nurture and harvest innovation, we are demonstrating to schools that our offering is aspirational. While we remain focused on our organisation moving forward as one structure, the way schools operate within this model should benefit them as individual institutions, and most importantly the children that we serve as a collective.

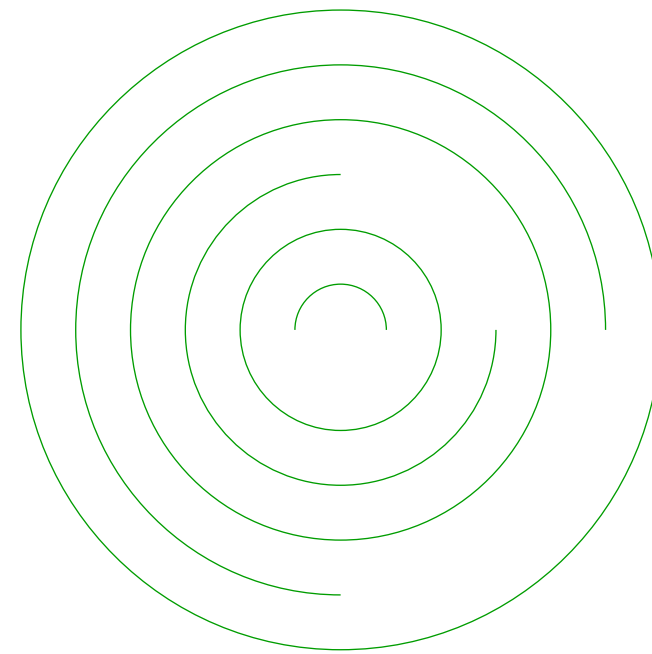


# Perfecting the art of change management at your trust



**Matt Darsley**  
Senior Partnership Manager  
at Arbor Education

Matt has been involved in the EdTech industry for the last six years, helping schools and MATs to improve their system infrastructure, and think differently about how systems can positively transform the way they work. For over two years, he has worked extensively with mixed phase MATs of all sizes with their procurement process and also as Programme Manager, leading implementation projects and change management processes.



We all know the Heraclitus phrase that ‘the only constant in life is change,’ and yet change is also the thing we fear and put off until necessary. The world of education has sometimes been slow to pick up on the great and sweeping changes that we’ve seen in the rest of the public sector, particularly when it comes to embracing cloud technology. The reasons for this are understandable: budgets are tight, retention is challenging, and the landscape seems to be constantly shifting. 2022 seemed to epitomise this landscape of change, both politically and also in the sheer numbers of schools who moved to the cloud: in one term alone nearly 1,500 schools alone moved away from legacy software.

Day-to-day, I speak to many MATs who are thinking about moving to the cloud and trying to align their systems, particularly as they look to grow. And what I’ve found is, whether I’m speaking to a newly formed MAT who doesn’t really know why they’re moving to the cloud, or a long-standing MAT with tens of schools, the common pitfalls remain the same, meaning trusts are setting themselves up for a far more challenging journey into cloud-based life than it ought to be.

It all comes down to change management and communication. In Lewin’s original change management model from the

1940s, communication sits as one of the steps in the first phase — long before any kind of implementation or decision-making. Skipping this step is hazardous, but it’s something I see time and time again. From the second your team starts to think about change, be this of an MIS or something entirely different, it needs to be communicated to all those it affects. It needs to be communicated why you are thinking about change, what the impetus was, what benefits you’re aiming for and what the long-term goal is. It’s also worth mentioning that this communication piece doesn’t sit within a single email; it should be an invitation for others to be involved in the conversation.

I’d always recommend starting with a document which clearly defines: what is being changed, who it is going to affect short-term (decision-makers), and who it will affect long-term. I’d also recommend putting together a working party, who are consulted throughout the entire process. Said working party shouldn’t just include directors and the CEO, but should be representative of stakeholders, including a headteacher, perhaps teachers or office managers.

The misconception made here is that communicating a decision is a tickbox exercise of letting those who will be affected, know about the change.

Instead, it should be formative and beneficial to the decision-making process itself. The working party should be a broad spectrum of what your trust is all about so that you get different viewpoints and skillsets feeding into the conversation. And, the likelihood is, if you turn to those invested in the ‘old way’, and say, we’re thinking of moving forward with something new, people will come out of the woodwork with crucial expertise on what it is they need to do their jobs well.

What I see far too often are well-meaning and well-researched project leads, who have spanned the entire procurement process, done their research and likely chosen the best system for their trust. And yet, there’s an assumption that all those other stakeholders will automatically reach the same conclusion without the months of context. Instead, it feels like a decision has been made and isn’t to be questioned. Those stakeholders are still at the beginning of the journey, meaning that whilst the project lead is trying to implement the project, they’re simultaneously having to justify and reconvince the trust that this was the right move. Of course, this means implementation itself suffers, training lacks buy-in, and engagement/uptake

is low, meaning that even if the system were the perfect fit, nobody is bought in enough to realise the benefits. Day one of the new system becomes a rush to make up for the lack of previous dialogue.

With growth leading as the goal for many trusts, strategic management of such changes becomes increasingly important. It goes without saying that those schools who are yet to academise are increasingly the most reluctant to do so, with a loss of autonomy most often quoted as the biggest reasoning. If MATs are set on growing and retaining schools, in a gradually more competitive landscape, they must caveat these fears with clear communication and an openness of conversation, regardless of whatever change they are making.

The other side of change and moving systems, for example, is not so much managing expectations as to creating expectations. Speaking strictly to MIS, it’s interesting that most trusts (though this will change), have never had to move before and have always used the same system. As a result, the question is often: this is how we did it before, how do we achieve the same thing, but in the cloud? The question should be: how can we do this better, with the support of cloud systems?

If MATs are set on growing and retaining schools, in a gradually more competitive landscape, they must balance fears with clear communication and an openness of conversation, regardless of whatever change they are making.

‘Cloud’ has been a buzzword for a while; there’s an idea that schools and trusts need to simply shift everything they currently do into the cloud. I would ask those that still buy into this philosophy why they want to directly replicate something which they are actively moving away from? Instead, why not acknowledge you want change and pick strategic tools that can make a measurable difference to the way your organisation runs? Improve your workflows, improve your processes, let the technology be part of your culture and vision rather than a tickbox, consider how it can be part of your school improvement plan, think how you could reduce workload or boost wellbeing. A change of this kind should be exactly that... a change.

What it all comes back to is that initial impetus to change, when the decision is made to think about something new. That’s when the real change starts to happen, and in order for it to be successful, central teams must have their change management and communication piece secure from the beginning, so that everybody knows exactly where you are going, why you’re going there, and how it’s going to transform the way you work for the better.

Since we started with a quote, it seems like a good idea to end on one too, this time from author and thought leader Lisa Bodell:

"Change cannot be put on people. The best way to instill change is to do it with them. Create it with them."

# How to build a people-first digital strategy, and why it matters



**Lisa Hawker**  
CIO at TransforMATive

Lisa Hawker is a recognised leader of Digital Strategy, IT & Systems, with the strength to spearhead multi-site technology services. Achieving success through rapid IT and systems improvement, she has a reputation for designing and implementing innovative digital strategies. In 2018, Lisa was nominated and a finalist for the 2018 Information Age Women in IT Future CIO Award, and was recognised for communicating and promoting technology adoption and nurturing a culture of best practices to achieve efficiency, impact, and sustainability.



**TransforMATive**

It's important not to limit your team into thinking that a digital strategy is solely an IT-led deliverable. It's not. It's an organisation-wide deliverable

Growth is integral to the future strategy of MATs across the country however, many miss out on the opportunity to both support and expedite growth plans with a strong digital strategy. I believe that a strong digital strategy puts people at its centre. But where to start?

## Discovery

What really makes for a strong digital strategy is, of course, unique to each trust and can be difficult to grapple in those initial stages. At TransforMATive, we recommend a 'Foundation' phase, which represents time to lay out those initial identifiers: what do we want to achieve? How do we get there?

In this phase, we ask MATs to consider their maturity across our four pillars — Technology and Infrastructure, Data & Insights, Cyber Security and privacy and EdTech and Innovation. Infrastructure often provides a good starting point, by which I mean anything that supports the delivery of technology — because your infrastructure is what will restrict your aspiration. It can be as simple as knowing you have a strong broadband connection or what systems are already relied upon in your schools. The non-negotiables. From there, you can look at organisational goals such as realising a 1-2-1 device strategy in order to understand if it's realistic. If it's not,

then the problems are brought to light and you can begin to tackle them at the foundation.

## Putting people first

Whether you're a small trust of schools who have recently come together, or a well-established MAT rethinking their business model, the purpose of any digital transformation project should be clearly defined from the outset. The most successful strategies are those that prioritise people and change as opposed to a technology led strategy. You should therefore be auditing your existing strategy and systems from a role-based perspective. Take HR, for example: what does it currently look like in our trust? How does our HR team currently work? Who do they work with? What do we want it to look like? If you are able to pin down the workflows for each role, and what needs to change in order for them to play their part in your future plans, then you can begin to properly understand how to build out your digital strategy around this. There is little point in building out your systems and processes before you've highlighted exactly where additional support is needed.

In the same vein, it's important not to limit your team into thinking that a digital strategy is solely an IT-led

# Digital transformation is not static and neither is the MAT landscape

deliverable. It's not. It's an organisation-wide deliverable that should be led and have commitment from all stakeholders (internal and external), such as HR, Finance, parents and guardians. In a bigger trust, you'd expect this to map out to Marketing, Estates and Communications teams as well. It's about helping the trust to realise that you are becoming a holistic service provider to the rest of your staff and students — you are delivering these systems, rather than simply supporting them.

This people-driven approach has identity at its core — something which is crucial when onboarding new schools, so that they can slot into the strategy seamlessly and have clear visibility over the vision. If you haven't cemented ways of communication before taking on a new school, the cohesion and culture begins to fray immediately. You want to make the transition as seamless as possible so that everybody is equipped to do their role, such as with a single payroll or HR solution. If you don't have confidence and agility built into your digital strategy, these processes become manual every time.

## Beyond infrastructure

Of course, this 'Foundation' phase is only the beginning of your digital transformation journey, and infrastructure is only one part of the strategy. The other pillars we work through with our MATs are data and insight, cybersecurity and privacy, and edtech and innovation. These pillars represent around a three year journey of identifying, understanding, implementing and embedding.

As a MAT goes through these stages, there should be governing groups monitoring progress at every level, and again not just made up of IT leads. To me, it's all about aligning the processes that you learn to use as an education leader with those in your digital strategy. Take learning walks, for example, and all of those things that educators are used to doing to understand the success of education in their schools. The same should always apply with digital strategy. It's all about monitoring and iteration, in order to embed your strategy across your organisation. You need to be agile, prepared, and brave enough to bin something if it's not working, and persevere where you need to rethink something else.

One pitfall I often see in trusts is their tendency to create a plan for digital transformation and view it as static. Monitoring the ongoing effectiveness of your digital strategy should be an inherent part of the strategy itself, and growth should reveal these opportunities for change. A mistake that's often made is trying to change things retrospectively, rather than looking forward, and shoehorning what's already been decided into future processes.

## And why it's important

A successful digital strategy should result in improved outcomes for children and young people. However, this goes way beyond academic standards and encompasses aspects such as enhancing the digital literacy of pupils and the organisation's workforce to be able to connect, collaborate and communicate in a safe, secure and scalable way.

Furthermore, a strong digital strategy can give trusts an edge over others, which is all the more important as the landscape of acquiring schools becomes more competitive.

And it's by all means a journey. It's important to acknowledge once more that digital transformation is not static and neither is the MAT landscape. There are some signs that inter-MAT relationships will become more collaborative, but this may change as competition for schools increases. To me, the strongest trusts will be those who stick firmly to that people and culture piece, building a digital strategy that is unwavering to those values but ready to be agile in the face of future change.



# ‘You’re going to need a bigger boat!’



**Dave Noble**  
Director and Principal  
at NSBL Associates Ltd

Dave Noble has worked in the private sector in HR, Operations and Customer Service Management roles for 22 years. In 2008 he moved to the public sector, and has since worked in LA schools, SATs and MATs. He is an experienced School Business Leader who has a track record of delivering change programmes, creating organisational capability and operating effectively as a senior executive leader within the education sector.



## It has become increasingly clear how the new corporate and governance responsibilities taken on by trusts require them to have significant scale to ensure they meet such expectations

You might be thinking, where’s this title quote from? Or what does it have to do with the growth of Multi-Academy Trusts (MATs)? To answer the first of those questions, “You’re going to need a bigger boat!” was said by Police Chief Brody in the 1975 film Jaws when he first sees the size of the great white shark and realises the threat he and his fellow shark hunters are facing.

To answer the second question, I have thought of this quote many times in recent years whilst working in the ever-changing education sector. I have found it to be particularly applicable for MATs, especially those who are emerging and growing, when faced with the challenge of delivering their charitable objectives and corporate responsibilities but also being faced with financial pressures associated with growing a trust. Working in a single academy trust and in emerging MATs since 2015, it has become increasingly clear how the new corporate and governance responsibilities taken on by trusts require them to have significant scale to ensure they meet such expectations.

The development of the education sector since 2010 has seen significant growth in the number and size of trusts. The increased ‘charitisation’ of the sector, removing schools from Local

Authority control, has placed particularly significant responsibilities on the boards which govern said trusts.

In March 2022, the government released its schools white paper, which set out an expectation that all schools should be part of, or have plans to join, a strong MAT by 2030. Political tumult has since got rather in the way of this bill and its credibility now questioned, but the expectation to academise has not, and likely will not, go away. Of the 22,000 schools in England, approximately 45% are currently academies. Of these, the FFT Education Data Lab reported in May 2022 that just 20% were part of a MAT of ten or more schools. The question that strikes me when thinking about those left to academise, and the idea that schools will be consistently encouraged to do so... is ten schools a big enough boat?

The range of corporate accountabilities and responsibilities required to be held by the MAT Board and the Executive Management team leading a trust are well known. The primary focus has to be on ensuring educational standards within the trust are at the required level, with a clear strategic plan for school improvement across all trust’s schools, but particularly for those identified as requiring additional improvement measures. A trust must



## Small boat syndrome will hold MATs back from meeting their corporate responsibility.

have senior leaders within it whose main role is to ensure schools are making progress, consistently. And the technology of a trust should support this in order to enable data-driven improvement: having up-to-date and relevant management information via your MAT’s MIS is just one example of a critical piece of tech that ensures school leaders are held to account. This requires monitoring, reporting and management at trust level to push for effective school improvement. Having individuals who are driving school improvement (requiring leadership and management skills), but also those who are able to make sure these decisions are truly data-driven and technologically-supported, is critical, but not always affordable. This is why scale is so important, to be able to facilitate having these roles in place.

However, as well as the core objective of any trust to deliver strong educational outcomes and progress for the young people in their care, a MAT also has a range of other corporate responsibilities covering Finance, HR, Safeguarding, Health & Safety, Data Protection, and Estates Management to name just a few. Academy trusts therefore have to ensure that the required policies, processes and systems are in place to provide assurance to Trustees and their

Executive Team that all activities within these areas are compliant to the trust’s policies. To ensure such assurance is provided, staff at trust level, again must be equipped with functional, management and leadership skills, whilst also being required to monitor, track and report compliance. Importantly they are also required to ensure any areas of non-compliance are managed and addressed within the MAT.

Small boat syndrome will hold MATs back from meeting their corporate responsibility. I’ve used the word corporate several times so far and it reminds me of a Governor who, reflecting on a new trust policy being implemented, said in a Local Governing Body (LGB) meeting — ‘this is getting all too corporate’. However, like it or not, academy trusts are ultimately corporate bodies; they are charitable trusts registered at Companies House and they require their legal responsibilities to be met. This doesn’t equate to having a corporate culture, rather being held accountable to what makes these organisations advantageous to school improvement.

Another significant barrier to the growth of MATs has been the dilemma of ‘Control versus Autonomy’. To my mind, this has wasted hours of debate, discussion and pain over what is or isn’t

managed at trust or school level, leading to huge distraction for MATs away from their core objectives. For instance, I once heard the Chair of a LGB within a MAT say that after three years they now finally understood there was only one governing body in their MAT, which was the Trust Board. All parties involved need to understand the ultimate accountability for ensuring the Trust meets its responsibilities lies with the Trust board... and not after three years.

That is not to say there is not a role for LGBs; there absolutely is in terms of ensuring two way communication, consultation and dialogue with the Trust Board, but their key role should be consultative. Ultimately, the Trust Board has the right to intervene if a school is failing. A long standing Headteacher friend recently said to me the term ‘earned autonomy’ was appalling. I had to disagree. If a school is performing where it should, then it is entirely right that they have greater autonomy within a defined scheme of delegation to meet their responsibilities within a MAT. If it doesn’t, the Trust must and has to intervene which is right for the children and young people in the school.

In a report issued in 2013/14 by Ofsted, it was stated that whilst primary schools had continued to improve, the performance of secondary schools had stalled. The report noted that one of the major contributory factors to this was that, too often, the poorly-handled transition from primary to secondary school. Consequently, the gains made by pupils at primary school were not embedded and developed at Key Stage 3. This led to KS3 being termed the ‘Wasted Years’, with plenty written on this subject since. I have recently heard faculty leaders in high schools refer to

having to repeat subject matter for a proportion of their Year 7 pupils due to curriculum models not being aligned with feeder primary schools. This has to be one of the most significant failures and challenges for the reforms of the education system in the last 12 years and the haphazard manner in how MATs have developed — can you really have schools in a MAT that are in both Clacton and Chester? For greater alignment to work between primary and secondary schools, experienced staff at trust level are required to align curriculum models, which is again a challenge when faced with small boat syndrome.

There is a need to put significant focus on ensuring a rapid growth in the size and scale of MATs, especially in the context of the current cost crisis. In my view, this growth needs to revolve around local and community-based MATs, either in entirety or within hubs. The MAT model should be ‘all through’, where MATs, as much as possible, are based on a feeder model of primary to secondary. And finally, MAT structures should be mindful that their team is always providing a stable system, with clear accountability and leadership, supported by strong systems, processes and policies, in order to deliver the best outcomes for young people. For all of this to happen sustainably, however, and to be prepared for whatever the future brings, MATs will be needing bigger boats.

# Methodology

In our survey of LA maintained school SLT, the majority of our respondents were:

Headteachers	18%
Office Managers	17%
Deputy or Assistant Head	12%

The majority of the respondents were from:

Primary schools	64%
Secondary schools	13%
Special schools	7%

In our survey of MAT leaders, the majority of our respondents were:

CEOs	22%
COOs	9%
CFOs	8%
Directors	8%

The majority of our respondents worked in trusts with:

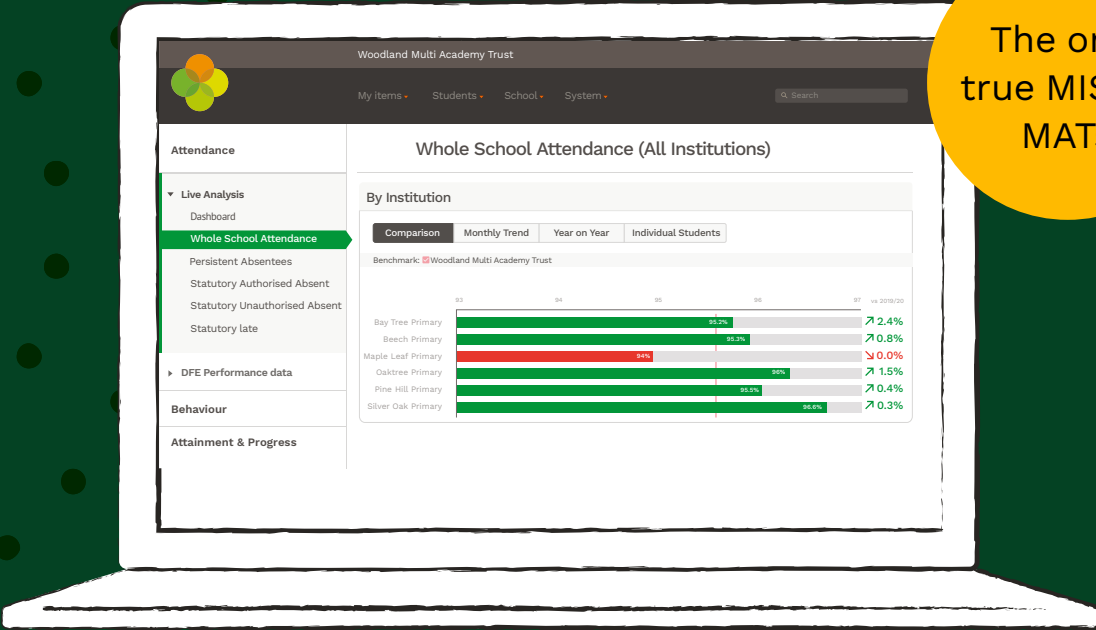
1-5 schools	30%
6-10 schools	44%
11-15 schools	8%
16-20 schools	7%
21-30 schools	5%
31-40 schools	5%
41+ schools	1%

To download Part 1 or Part 2 in our Creating a Cohesive Trust series, visit <https://bit.ly/creating-a-cohesive-trust-series> or scan the QR code:



# Choose a better way to work with Arbor MIS for MATs

The only true MIS for MATs



Arbor MIS for MATs is custom-built for better collaboration across your trust, with tools that make working together easier at every level.

Find out how MAT MIS could work at your trust:

[hello@arbor-education.com](mailto:hello@arbor-education.com)

## See the big picture

See trust level data on ready-made dashboards, or access individual schools from a trust login.

## Take action centrally

Manage key workflows centrally – from attendance to assessment policies – with Arbor’s fast, intuitive MAT tools.

## Collaborate and bring everyone together

Give everyone across your trust the tools to do their best work. Centralised communication makes working together easy.

We'd love to  
hear from you  
Get in touch

E [tellmemore@arbor-education.com](mailto:tellmemore@arbor-education.com)

T 0208 050 1028

W [www.arbor-education.com](http://www.arbor-education.com)

