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ISSUE 04 / WINTER 2020

#TrustLeaders

MAGAZINE



FEATURING

A new narrative for academy trusts - one year on, what happens next?

What trusts can learn from the DFE Governance Investigative Report

CEO in Focus:
John Brady, CEO of
Schools Advisory Service

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Introduction



Welcome

As we near the end of an exceptionally busy and challenging Autumn term, I would like to take this opportunity to applaud the ceaseless hard-work and dedication of #TrustLeaders, teachers and all school staff during this period. It has, yet again, been a term like no other, as schools have continued to contend with extreme operational challenges on a day-to-day basis as a result of the Coronavirus pandemic.

Here at Forum Strategy we have endeavoured to support Trust Leaders to keep strategic priorities in mind despite the current difficulties, and to keep thinking ahead about the future post Covid-19, (now closer on the horizon than ever thanks to the development of vaccines that are already beginning to be rolled out!)

With this aim in mind, we have begun to provide strategic groups for our #TrustLeaders based on their key priorities; on pupil and staff wellbeing, remote learning and technology, and environmental sustainability. We have also undertaken research into the role of academy trust CEO, which has provided greater insight and understanding into the role of Trust Leader than ever before, and which is already helping to inform our work with you further. And finally, we have continued to provide the space for academy trust CEOs nationwide to reflect on key strategic issues, and to network with one another, in our #TrustLeaders events and in our annual conference, creating some much-needed time for both reflection and inspiration for all involved.

In this latest edition of our #TrustLeader's magazine we have included summaries of some of our most recent key events and research. Also included are articles from Professor Toby Salt, John Brady (CEO of Schools Advisory Service), and from our partners at Wrigley's Solicitors and Henwood Court. Each article is full of helpful and insightful information for readers to support you not only through this current time, but also in looking ahead to 2021 and beyond. We have also included an interview with our new COO Alice Gregson who will be joining us in the new year, and a list of Forum Strategy's key upcoming events to get in your diaries for next term!

I wish each and every one of you a restful and restorative Christmas break when it arrives. You certainly deserve it!

All my very best wishes,

Rachael Gacs
Communications and Resources Manager,
Forum Strategy

Visit our new website at: www.forumstrategy.org

A new narrative for academy trusts – one year on, what happens next?

By Michael Pain, Forum Strategy



Almost one year ago, Forum Strategy published *'a new narrative for a new decade: academy trusts at the heart of their communities'*, following extensive consultation with trust leaders about their hopes for the academy trust sector in the decade ahead. I have been overwhelmed by how many trusts have epitomised this since, both formally – before COVID19 – through their visioning and strategic planning, and more informally through the ongoing and inspiring response to the pandemic.

WHAT INSPIRED THE DEVELOPMENT OF THE NEW NARRATIVE IN 2019?

For all the talk of autonomy over the previous decade, many CEOs and trustees said that the academy trust sector had generally only scratched the surface in creating new ecosystems of improvement and innovation; or, indeed, in going beyond national top down

measures and definitions of 'success'. It was, many felt, a sector that over the previous decade had spent too much time looking upwards, and not enough looking outwards. Then there was also deep frustration that the trust sector was still very misunderstood by the general public – the people it ultimately exists to serve. In too many cases, scandals and failures had emerged from a culture, driven by some of the earliest trusts, that had focused on bigger numbers (growth and government scores on the doors) at almost all costs. Our members deeply wanted to change that perception and, through that change, the deep misunderstandings of trusts that had existed for too long. We wanted the new narrative to help that important cause.

Hopes for the next decade were based on a strong determination to change the emphasis: placing academy trusts at the heart of their communities – driven by people and purpose, not simply by a fixation on national KPIs, one size fits all frameworks, and growth for growth's sake. The new narrative we developed spoke of capturing the hopes and aspirations of communities – not least pupils and parents themselves – in defining 'success'; of trusts aspiring to become employers of choice in and for their communities – setting the bar in terms of being forward-thinking and inspiring places to work; of being beacons of sustainability with long term goals that go beyond politics and create a better future for all; and of togetherness.

Trust leaders recognised that some of the very complex and strategic challenges they face in the decade ahead, from poverty, mental health and technological change, through to

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the fast-changing world of employment and the new skills it demands, cannot be addressed in isolation. It demands a compelling vision, partnerships and goals that transcends their organisations and mobilises communities in the broadest possible sense. The new narrative helps trusts to begin to reach out with a compelling message that goes beyond the board or central teams.

“COVID19 HAS ACCELERATED EFFORTS TO CHANGE THE NARRATIVE, BUT THERE’S MORE TO DO”.

So, one year since we published the new narrative, how have things gone? Well, we all know what happened in 2020 and – rather than hamper our collective efforts – the onset of COVID19 has accelerated the efforts to place academy trusts at the heart of their communities. Trusts right across the country found a real opportunity to demonstrate their role at the heart of their communities, with countless stories of how they had contributed to food banks, developing PPE for the NHS, paying for holiday food vouchers when government said ‘no’, extending their mental health services, signposting to support for families, and so much more. You can read just a handful of inspiring examples on our website.

The last nine months have also allowed trusts to demonstrate how their model (and let’s not forget, forging the right culture), makes them potentially such great and supportive places to work. Through the crisis, teachers – under enormous pressure – were able to collaborate across schools (without any limitations) sharing resources and mutual support for online learning. Headteachers were able to access proximate (very accessible) support from health and safety experts, IT experts, site management experts in their central teams, not in a large and over-stretched authority. These experts were colleagues they already knew well and who knew their schools well, and were just a phone

call away. CEOs were able to champion their trusts and their communities alongside other senior local leaders.

It is clear that COVID19 has to some extent lifted the veil on academy trusts and dispelled some of the myths. Life for heads in trusts has largely been more manageable than for standalone schools, teachers in trusts have been able to be part of continuous support network where materials and resources are shared freely and openly (but with consistent expectations and quality assurance), and schools and parents have benefited from levels of support service expertise that has been unprecedented. I’ll share just two examples – one of a trust that established had a dedicated phoneline for parents to help signpost them to local support services and resources they needed during the crisis; and another that has used its fundraising prowess (yes, the trust used its economies of scale to employ a central fundraiser) to ensure no children went without technology.

This has seen an unprecedented lack of negative stories about academy trusts in the press. One, because people, I believe, are better understanding the benefits of academy trusts and their role. And two, I believe the current NSC has a real handle on what’s going on in the sector, is very focused on the detail of trust capacity, and has overseen a period of stability and relative lack of crisis in trust governance that we haven’t seen before.

“SO WE’VE MADE PROGRESS, BUT THERE’S A BIG OPPORTUNITY ABOUT TO PASS MANY TRUSTS BY”.

However, whilst we’ve come so far with the narrative for academy trusts at the heart of their communities, and whilst trusts up and down the country have demonstrated their value to their communities, it is important to remember these are unusual times.

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Alongside the virus, there are no Ofsted inspections taking place, and there have been no SATs, exams or league tables. Trusts have had a little more space to do things differently with purpose. This will change soon. But, for now, we have a top down accountability vacuum that means, at least for a short while, the chance to create something very different and more long lasting is still upon us.

If the narrative is going to stick, if academy trusts are going to be seen as community-focused organisations for life, not just for COVID, trusts and their boards need to create an alternative accountability model locally. This means being more accountable to their communities through a richer alternative model that sits alongside the national, one-size fits all one. An intelligent model of local accountability that, together with a strong community-focused vision, with strong and strategic partnerships, and clear goals for our communities, can secure trusts as places that elevate communities through mobilising everyone in the best interests of children and young people. As I said in my conference speech in 2019, there is nothing that galvanises communities – schools, parents, employers, community groups and charities, health services – like service to the next generation.

If that is to be a reality after COVID 19, we all need to be thinking now about setting the vision and goals, and developing the partnership that will put academy trusts at the heart of our communities. And we need to make sure – in the absence of the one size fits Ofsted and league tables – that we give accountability to communities the prominence and status it deserves. This pure accountability, as I call it, is beginning to emerge, and it is based on principles that have underpinned almost all successful organisation in every sector – putting people first.

The coming months provide a once in a lifetime opportunity for trusts to redefine their relationship with accountability, beyond a 'one size fits all' model imposed on them by government, by self-generating a richer accountability to their communities. These are challenging and uncertain times, but challenging and uncertain times are almost always those that give rise to real change and progress. The question is, has your trust board recognised it yet?

Michael Pain is founder of Forum Strategy and author of Being The CEO



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CEO Strategy Group – Pupil and Staff Wellbeing - Session 1

Forum Strategy has established 3 CEO strategy groups to focus on key strategic priorities amongst the reactivity and operational nature of managing the pandemic. These include groups on pupil and staff wellbeing; remote learning and working; and environmental sustainability; and can be attended by all #TrustLeaders network members. The following is a summary of the meeting of the first CEO Strategy Group on 3rd November 2020.

Session 1: Measuring what matters – the culture we encourage

The first meeting of the CEO Strategy Group (Pupil and Staff wellbeing) was held on Tuesday (3rd November), with a focus on how trusts can begin to embed their commitment to wellbeing through 'measuring what matters'. The group is Chaired by Gary Wilkie (CEO, Learning in Harmony Trust), and those represented on the group include CEOs from over twenty Trusts across the country. This first meeting was also attended by Mark Russell, CEO of the Children's Society.



Gary Wilkie

Starting with an overview of the group's remit, Gary Wilkie made the distinction between the results-driven, Ofsted-focused mindset, and the values and outcomes-driven approach that nurtures a culture of support. He said that while it's vital that the actions we take are evidence-based, there is also a need to recognise the influence that the types of evidence and data we choose to collect has, and how those values feed into and reinforce the culture we are creating. This is such a crucial starting point for wellbeing strategy – for pupils and staff.

“What you talk about and the way you talk about it becomes the thing that others act upon”

Gary challenged the group to consider how we can work together to act as strategically about developing a culture of positive wellbeing as we do about other elements of school improvement. Mark Russell spoke on the subject of the Children's Society's 'The Good Childhood Index', a leading set of indicators that are used at a national level to measure children's welfare and wellbeing. The Good Childhood Index is a short questionnaire that can be completed by children themselves and used to measure well-being overall and in relation to 10 aspects of life. It includes a single-item measure of happiness with life as a whole, a five-item measure of overall life satisfaction, and questions about happiness with 10 different aspects of life including happiness with school life and relationships with family and friends. The Good Childhood Index's assessment of childhood wellbeing in the UK as the lowest in Europe has even prompted groups within government to call for a substantial reform of the GCSE system; as a high fear of failure was identified as one of the key factors in this low rating, alongside a high rate of child poverty.

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The CEO Strategy Group discussed the value of tools like the Good Childhood Index, which is freely available for use, and the way in which such tools could be implemented at Trust level. There was an enthusiastic response to the commitment of the Children's Society to work alongside Trust Leaders in developing approaches and resources collaboratively to make a tangible difference to childhood wellbeing. These include looking at how the Good Childhood report could be implemented at trust-level, enabling trusts to measure children's welfare and wellbeing, benchmarked against national indicators. The Children's Society and CEOs will now look, ahead of the next meeting, at how to take some of these – and other – ideas forward.

The group then switched their attention to staff wellbeing. Andy Mellor and Gemma De Haviland from Schools Advisory service addressed the group about the importance of maintaining staff wellbeing across all levels of management and leadership, leading with a discussion about the risks of a 'whatever it takes' culture, and how it can lead to overwork and staff burnout which ultimately does more harm than good. Andy emphasised how vital it is that every individual has a clear understanding of what their own workload is and where they fit into the wider structure of their Trust, as this can prevent staff becoming overworked and build an atmosphere of mutual support.

In order to measure what matters in this case, SAS have worked in partnership with the NGA to develop a **wellbeing toolkit** which can be completed as a joint activity by CEOs and Board Chairs to assess how a school or Trust has been able to manage wellbeing, and the extent to a Trust's leadership team have been supported in fulfilling their roles. It is clear that where leaders feel supported and healthy in their roles it is more likely that their teams will too due to the cultural impact.

Refreshingly, a number of members of the group were able to share ways in which they feel that their own wellbeing has been supported by their trust board. Many cited access to quality coaching as having had a significant impact. Other examples included a chair facilitating a conversation to explore the way in which executive reporting requirements could be reduced. As a result, the formats for reporting to committees and Board have been significantly streamlined with a focus on 'giving Trustees what they need, rather than what some of them want.'

"It is clear that where leaders feel supported and healthy in their roles it is more likely that their teams will too due to the cultural impact".

Gary Willkie also gave an update on the progress of the Department of Education's upcoming Wellbeing Charter, a recommendation from the DfE's Advisory Group, of which he was a member. He was able to share the very positive progress that the group is making, and the commitment of all involved to developing a tool that will be practical and meaningful, outlining commitments from DfE, Ofsted and employees. Though at present the Charter is the final stage of drafting, the focus now is on planning its launch and implementation in an effective manner.

In closing, CEOs took the opportunity to reflect on the session, giving their support to the strategies that had been discussed, and proposing new potential partnerships within the group. Areas identified for discussion at future sessions included 'the language of wellbeing', approaches to flexible working, and how to work in a way that that staff at all levels take responsibility for their own wellbeing, as well as the wellbeing of others.

The Group will meet again on 22nd January 2021.

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CEO Strategy Group – Remote Learning and Working – Session 1



Kath Kelly

The following is a summary of the first meeting of the CEO Strategy Group on remote learning and working, which took place on 30th November 2020. The session was chaired by Kath Kelly, the CEO of Lionheart Academies Trust (an EdTech demonstrator school).

CONTEXT FOR CEOS AND EMBARKING ON THIS AGENDA

The 'Being the CEO' report 2020, published for #TrustLeaders in October, highlighted that remote learning and technological capacity is seen as a top organisational priority for a significant proportion of CEOs, both in the year ahead and beyond. The urgency around building greater technological capacity and expertise to support remote learning and working has been accelerated by the pandemic. However, the Being The CEO report also showed that CEOs

do not currently feel confident in overseeing development in this area. The aim of this group is, therefore, to support Trust Leaders to reflect on how they strategically plan for and resource remote learning and technological capacity, post Covid-19, and in the long-term.

Michael Pain, founder of Forum Strategy, introduced the session by emphasising that the use of remote learning and technology poses many questions for the CEOs of academy trusts. A key purpose of this group is to empower CEOs to ask themselves the right questions, which should include:

- *What is your organisation's vision regarding the use of technology?*
- *How does technology currently serve your organisation, and how can technology serve it more effectively moving forward?*
- *How does your trust's use of technology improve the educational provision of pupils?*
- *How does your trust's use of technology improve organisational outcomes?*
- *How can it be used to have a positive impact upon staff – particularly in terms of wellbeing, workload, and professional development?*
- *Could effective use of technology be an investment which saves your organisation money in the long run?*
- *Can technology be used as a tool which helps to build better community relationships?*

Michael said that it is very easy for trusts and organisations to become servants of technology, and that beginning with a clear vision and expectations for how technology improves the experience for all – with objectives – is key to trusts (and their staff and pupils) becoming 'masters' of it.

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Too many organisations have seen customers, staff and finances exacerbated by technological failures and frustrations, and tech should always serve the bigger vision and goals.

LEARNING FROM ONE ANOTHER'S EXPERIENCES

Kath Kelly, the group's Chair, began by setting out her hopes for the group, not least the ability for CEOs to come together to learn from each other; especially when the pace of change is significant and trusts need to deliver the very best outcomes for pupils. She shared the recent experiences of Lionheart Academies Trust with regards to remote learning and technology.

When remote learning began in March, the trust faced a huge challenge because many of their disadvantaged students could not access learning due to lack of access to a device or the internet. Since, as a trust, they have made a substantial investment in their technological provision, purchasing around 2000 Chromebooks that have been distributed to the learners that need them most, along with internet access. Staff without a home device have also been provided with laptops.

A second challenge that the trust faced was the huge variation in skills and competency, of both students and staff, when using technology. In response to this a series of sessions were delivered for students about how to engage in online learning, which also included the expectations of them in terms of behaviour and conduct during online lessons. The trust-wide priorities for the year were also adapted to include CPD for all staff around technology, which addressed technical skills, as well as pedagogy around remote learning.

Kathy believes that as a result of their investment in technology over the past few months, Lionheart Academies Trust is now in a much stronger position to use technology to affect positive change moving forward. For example, through advances in teaching and learning, and the opportunities for greater staff collaboration, and more flexible working, which technology can provide.

USING RESEARCH TO INFORM BEST PRACTICE FOR REMOTE LEARNING

The group was then joined by Tony McAleavy and Sarah Horrocks of the Education Development Trust. During 2020 Tony has worked with the EdTech Hub analysing research on remote learning during the Covid-19 crisis, and Sarah has worked with a range of schools, supporting them in their move to remote and blended learning.

Tony shared with the group his insights regarding what research suggests is best practice in pedagogy for remote teaching, based on his work for the EdTech Hub on the topic. He explained to the group that the essence of good remote teaching is no different from the essence of good face to face teaching in terms of the components, but that the physical distance introduces extra challenges, particularly related to assessment, access to fewer visual clues, and less real time information. Therefore, teachers must be very intentional about addressing these challenges by using every available opportunity to demonstrate their presence to their students, and ensuring that they engage with their students in a variety of different ways. This can include instructing, guiding, questioning, listening, assessing, advising, challenging, and reassuring students as appropriate. Research also shows the need to create a sense of a 'community of inquiry' which involves the learners having a sense of belonging, and of 'working together' in a class of other learners. Therefore, an effective remote teacher must also intentionally promote this sense of community.

Sarah Horrocks then encouraged colleagues to reflect and feedback about their trusts use of technology and remote learning over previous months. Participants reflected on what they felt they had learnt over the past few months, and specifically, what had worked well, and what hadn't. They then considered which aspects of their approach they wanted to continue to use moving forward, what they wanted to leave behind, and what areas they want to develop further.

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SOME KEY CONSIDERATIONS

Through discussion, the group considered some key issues and areas that are worthy of further exploration – both with their boards and teams, and with each other, including:

- **The choice of technological hardware, software and training is a crucial one – it could become an investment or a financial drain for a trust.** This is a crucial issue that many trusts and CEOs are currently wrestling with as they try to invest in the resources that have the greatest impact and longevity.

This led to an interesting discussion, and to the conclusion that it is crucial for CEOs and central teams to regularly seek feedback from staff, pupils and parents on how they feel about the use of technology within the trust, and where it is helping them, or hindering them, most. Leaders of trusts have a significant ‘market research’ base, and can then use this feedback to guide their decisions moving forwards. It is important that CEOs understand how all their ‘users’ feel about the platforms – not least teachers- before they invest substantially. The choice must also relate to the board’s and executive team’s wider vision for the trust and remote learning.

- **There is a real opportunity for technology and remote working to help reduce workload and raise standards.** Many of the CEOs present explained a new found commitment to giving teachers (and other staff) more time to work from home where possible, and encouraging teachers across their schools to use the technological platforms to collaborate, share and undertake peer review on planning and resources. Working from home and remote collaboration between teachers across schools are key ways in which the profession can ensure it is more appealing to new recruits and retain staff. This becomes even more important as other sectors look to compete for talent through ‘home working’ opportunities. However, the group were also clear that nothing replaces teacher presence or physical meeting of colleagues and that what is envisaged is a shift, not a revolution, in working practices.

- **The quality assurance of online learning and resources is important, but a culture of peer review is key to getting the culture right.** This is an area that is still emerging and evolving. In some ways online teaching offers a better opportunity for headteachers and senior staff to review the educational experience of pupils and to quality assure provision. It also provides an opportunity to understand pupils’ needs and development areas in real time. However, culturally, it is important that the platforms are not seen as a way to create more ‘scrutiny’ of teaching, but as a positive force for teachers and leaders across settings to work together to refine learning and teaching and pupil progress; with the greater availability of collective expertise of professionals driving strategies, improvement and QA. However, peer review and collaboration – in order to improve and refine both teaching and resources – needs careful co-ordination, protocols and support. This was seen as an area where leaders can add real value.

LEGAL CONSIDERATIONS OF REMOTE LEARNING

The final input of the session came from Chris Billington of Wrigley’s Solicitors, who addressed some of the key legal considerations and implications around remote learning and working. Chris explained that all schools and trusts should now have child protection and safeguarding policies which specifically refer to the measures in place to protect children who are receiving remote education. Some of the trusts present had undertaken wholesale reviews of all their policies looking at them through the ‘prism’ of remote learning as well as face to face provision, and all trusts are encouraged to do this. Staff training and understanding on the back of these changes is also essential. More information on the legal considerations around remote learning and working can be found on Wrigley’s Solicitors website.

The next meeting of the Group will take place in early 2021 and is once again open to all #TrustLeaders members. Date TBC via members’ and subscribers’ briefings.

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Being the CEO Report - A Summary

By Rachael Gacs, Forum Strategy



Over the past few weeks, I have had the pleasure of interviewing a number of CEOs about their experiences of, and reflections on, leading an academy trust. At the same time, Forum Strategy has undertaken a survey of almost eighty CEOs to capture how they feel about their transition into the role, and to understand their priorities for the months and years ahead. The combined results have made for fascinating reading, as we all develop our understanding of the role.

Professional background

The survey has provided us with a range of insights. It shows, for example, that the majority of CEOs began their careers as classroom teachers, and generally have had years of experience as leaders within the education sector prior to their current role. At the same time, I was able to talk to CEOs who had a varied career history, and found that experiences in wider sectors, (such as human resources, business, the charity sector, and the finance sector), had given them a valuable additional perspective on organisational management and leadership.

We are now seeing an increasing number of CEOs come to the role armed with experience of leadership both within and beyond the sector, and whilst over 95% of our survey respondents were former teachers, over 40% did not see a background in teaching as a necessary prerequisite for the role of CEO. We are certainly beginning to see more CEOs with non-teaching backgrounds taking on the job, and achieving sustained success. Whatever the case, the majority of CEOs tell us that they found the best preparation for the role is having experience leading teams of people.

“We are certainly beginning to see more CEOs with non-teaching backgrounds taking on the job, and achieving sustained success”

Many of the CEOs that I spoke with who were former headteachers or executive heads also emphasised how important it was for them to develop new skills once they became CEO. In fact, it was evident from all of my conversations with trust leaders that continued learning and professional development forms an integral part of being a highly effective CEO. This, in the main, is because the vast majority of CEOs find that the role differs considerably from any that they have held previously.

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Letting go

Without a doubt, for those who have made the transition into the CEO role, the biggest change was 'letting go' of the day to day operational responsibilities, and developing a strategic approach to system-wide leadership instead. For many CEOs this also means learning to let go at an emotional level, whether that be to their attachment to one particular school, or more generally, to their involvement in the day to day operational running of a number of schools.

With most CEOs being former teachers, it came as no surprise when our survey showed that the aspect of the role where the majority are most confident is in overseeing school improvement. There is also a clear degree of confidence in working with their boards and in managing HR. However, the CEOs surveyed were generally not as confident overseeing areas where they were less likely to have had previous experience. These areas include substantial procurement exercises, technology, media and marketing, and managing 'high level' government relationships and politics. This is where the importance of continued professional development comes in again. However, it also reveals how crucial it is for CEOs to secure - and surround themselves with - a highly skilled leadership team with diverse expertise. The importance of being surrounded by a great team was emphasised by every single one of the CEOs I spoke to.

Priorities

In terms of short-term priorities, our survey showed that CEOs see the growth of their organisation, alongside securing pupils' and staff wellbeing, as their top priorities for the next twelve months. In this short-term period, CEOs are also focused on building improvement leadership capacity (possibly because they are still doing so much of this themselves). They are also focussed on building technology capacity – no doubt driven by the rapid shift to remote learning brought about by COVID-19. However, over half of CEOs who took part in our survey did not feel confident about

overseeing development in this area, and as technology becomes increasingly important, this is undoubtedly an area where many CEOs would benefit from professional development.

"In terms of short-term priorities, our survey showed that CEOs see the growth of their organisation, alongside securing pupils' and staff wellbeing, as their top priorities for the next twelve months."

Interestingly, despite the fact that the survey and this report were undertaken in the midst of the COVID-19 crisis, only 12% see crisis management as a priority in the year ahead.

Most of the CEOs surveyed do not yet rate environmental sustainability as one of their top priorities – either within the next year, or in the medium- to long term. This is despite the fact that children and young people see environmental sustainability as one of - if not the - key issue of our time. Encouragingly, however, we are seeing a growing group of CEOs see this as a major priority, and they are shaping their organisations to respond accordingly. For example, one of the CEOs I interviewed informed me that her trust was about to launch a five-year strategy which has sustainability as its core focus. Forum Strategy is also committed to helping trusts to develop in this area, with the launch of our CEO working group for sustainability beginning on 7 December 2020.

Sources of Support

Both our survey, and my conversations with CEOs, have reflected just how vitally important it is for trust leaders to have a support network; perhaps never more so, given the turmoil of recent months. Our research shows that most CEOs consider their key sources of support as being their 'colleagues' (both internal and external to the trust), and facilitated CEO networks, such as Forum Strategy's #Trustleaders networks.

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The board, mentors and coaches, and friends and family also featured highly as key sources of support.

“Both our survey, and my conversations with CEOs, have reflected just how vitally important it is for trust leaders to have a support network; perhaps never more so, given the turmoil of recent months.”

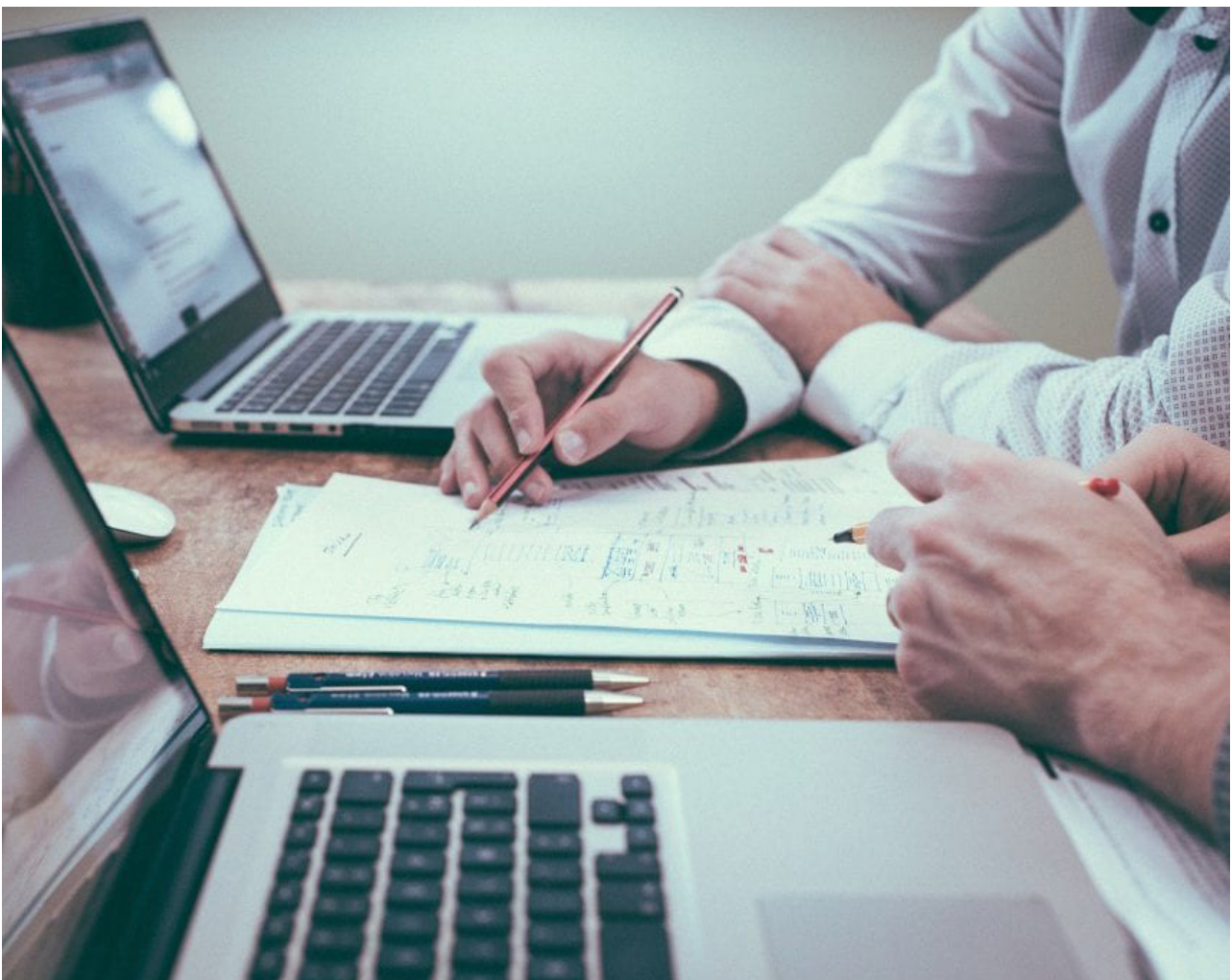
Conclusion

The role of CEO is still a relatively new one in the world of education, and there are clearly aspects of the role that CEOs are ‘learning along the way’. CEOs have overwhelmingly spoken to us about a growing awareness of the need to develop

clear and compelling leadership narrative, particularly given the scale at which they are working. They have also recognised the importance of having a strong network of peer CEOs from which to access learning and support, and the importance of systems and project management in leading an organisation at scale.

In our report we have attempted to encapsulate and disseminate many of the hard-won lessons of CEOs, in a way that we hope will be beneficial not only for the next generation of trust leaders, but also for current CEOs, and those of us involved in CEO professional development.

The full report is available for our #TrustLeaders members via Forum Strategy.



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What can trusts learn from the DfE Governance Investigative Report?

By Graham Shaw, Wrigley's Solicitors



WRIGLEYS
— SOLICITORS —

Here we look at the key highlights for multi-academy trusts from the DfE's School and Trust Governance Investigative Report.

Background

The Department for Education (DfE) has published the **School and Trust Governance Investigative Report**. The DfE commissioned the **National Foundation and for Educational Research** (NEFR) to research school and trust governance and provide evidence to inform future policy and resources. So what are the key findings for multi academy trusts?

Constitution

The average size of boards and local governing bodies (LGBs) is 9.6 and 10.3 respectively, which is consistent with good practice. However, trustees and LGB members are largely female, white, over 40 and in employment, which exposes a gaping chasm in diversity. We should therefore expect the DfE to focus policy and resources in this area. Trusts can also follow the recommendations of the Charity Governance Code and implement a diversity strategy, monitor progress and publish an annual diversity report.

The report also highlights a notable degree of overlap with people holding multiple governance roles. This will be disappointing for the DfE given their focus on separation but is not unexpected given the perennial recruitment challenge.

What is disconcerting is the misunderstanding of roles and status which still persists, with board members calling themselves members and members behaving like trustees. Proper training and clerking is therefore a pressing need.

Recruitment

Barriers to recruitment continue to be the perceived workload of a trustee or LGB member and the lack of time to give to the role. An effective clerk can relieve the burden by simplifying the paperwork, while eliminating duplication in decision making between boards and LGBs can also help.

Boards also struggle to fill their skills and knowledge gaps in community engagement.

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This can be addressed by recruiting candidates from parents and LGBs, which is why strong relationships between boards and their LGBs are essential.

Meanwhile, a lack of succession planning into the role of chair is a concern, with people asked to take the role when they're not ready or suited to the position. The report therefore recommends that vice chairs receive training and share the chair's workload so that they're able and willing to step up when the time comes. The same approach can be extended to trustees to ensure succession planning for the vice-chair.

Delegation

Most multi academy trusts (MATs) have committees (85%) and LGBs (82%) while only 18% have regional cluster groups. In most cases, delegated decisions are reported to the board for scrutiny or approval which is core to effective governance. However, some boards and LGBs perceive the allocation of responsibilities differently, for example regarding the appointment of the headteacher. This highlights the need not just for a clear scheme of delegation (SoD) but also for the SoD to be presented in different formats given the various ways we each prefer to receive information. LGBs should also receive training to ensure they understand the SoD and have the skills and confidence to discharge their functions. For example, the report highlights a particular need for training in financial management and planning and in-school data.

Clerking

Most boards are supported by clerks who are employed by the MAT (85%) with an average salary of £9,197.90. Where the clerk isn't an employee, the average charges are £29.33 (hourly) and £188.44 (per meeting). However the clerk is engaged, trusts must benchmark the cost to ensure they are providing value for money (VFM) in keeping with the Academies Financial Handbook. This must include the support provided by the clerk. Here, 31% support 6 to 10

boards and 38% support 2 to 5 LGBs. Where VFM is not being provided, it may be appropriate to regrade or restructure, in the case of an employee, or re-tender the contracted service.

Crucially, 25% of clerks don't see providing or signposting legal advice as part of their role. As this is a core component of the clerk's role, as confirmed by the DfE's **Clerking Competency Framework**, this a major concern and one we can fully expect the DfE to address. Trusts must also review the job description or contract for their clerk and consider whether training may be appropriate to support the role.

Most clerks also report not being performance managed by the chair or at all. Trusts must address this priority to ensure the support and service they're receiving is fit-for-purpose.

Effectiveness

Board effectiveness remains an issue with trustees believing they have the necessary skills and knowledge in school improvement and education policy while the executive disagrees.



School and Trust Governance Investigative Report

Report

October 2020

Kelly Kettlewell, Megan Lucas, Tami McCrone, Jose Liht and David Sims:
National Foundation for Educational Research

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Chairs therefore need to co-ordinate between the board and the executive to avoid mixed perceptions and a lack of confidence in the board's ability to support and challenge the executive. That said, the report confirms that boards do in practice lack skills and knowledge in these areas. This heightens the need for regular skills audits and relevant training to ensure boards are able to perform their role effectively. This extends to other identified skills and knowledge gaps in wellbeing and HR which are particularly critical during the pandemic.

Boards also display too much focus on operational matters. This is understandable given the added focus on compliance and pupil and staff wellbeing during the pandemic. However, boards must maintain their focus on the strategic and leave the executive to manage the operational. In this way, they will help relieve the burden on the executive and support them during this unprecedented time.

Boards do evaluate their effectiveness. However, they focus on self-evaluation against trust plans, key performance indicators and guidance, and by skills audits and away days. These are important and all have their place. However, boards must also engage external support as required and no less frequently than once every 3 years for an independent assessment of their effectiveness and how they can improve. If your board is in need of an independent governance review, do get in touch. The **governance review service** provided by **Wrigleys Solicitors** and **Satis Education** offers the advice and support needed.

Training

Finally, the report confirms that boards and LGBs tend to receive their training from the trust, the **National Governance Association**, **The Key** and/or their local authority. All these sources have their place. However, care should be taken to ensure that the training and support provided by the local authority understands the legal and policy context for trusts, not just as those relate to maintained schools.

Boards are less likely to receive training and support from a National Leader of Governance (NLG) or mentor or by observing other boards. These perspectives can be invaluable and needn't cost the earth.

The report further identifies particular skills gaps in financial management and planning, school data, statutory policies, and staff management. The DfE and trusts will need to give these their added focus.

Given the time pressures on trustees and LGB members and the cost sometimes involved in securing training, the report identifies the need to signpost guidance and make this as accessible and digestible as possible. It may help to summarise the key points, perhaps in a checklist. An effective, professional clerk can help with this and so ease the burden on the rest of the executive.

MATs already invest in and support CPD for their staff. It is important to recognise the need to do so for their governors, trustees and members.

Summary

The School and Trust Governance Investigative Report identifies and reinforces key governance challenges for trusts. Many of these are interconnected and so require a co-ordinated response. We need the DfE to provide clear and effective policy and targeted resources to support trusts as they continue to address these challenges. Trusts will also address the governance challenges by drawing on their own hard-earned experience and expertise and by collaborating with each other, which they've done admirably during covid.

Being the CEO

An Interview with Louise Wilson – St Thérèse of Lisieux Catholic Multi Academy Trust



"I've enjoyed the process of continually learning since I took up the role. As CEO, I view myself as the lead learner, and I'm constantly looking for opportunities to develop my understanding further."

Tell us about your career before becoming CEO.

I came to the CEO role having been a teacher and school leader. I was a deputy head, responsible for teaching and learning and curriculum, and then progressed to become headteacher of two Catholic secondary schools. I had success as a senior leader and headteacher, specifically, in managing change and taking schools from inadequate to good.

What attracted you to apply for the CEO role?

As a practising Catholic and person of faith, being CEO of a Catholic MAT (multi-academy trust) brought my two interests and passions together. It also seemed like the natural next step in terms of leadership progression for somebody that had had a successful career as a secondary headteacher.

What particularly attracted me to my current role was the vision of the Nottingham diocese, that recognised the potential of the multi-academy trust structure to safeguard the mission integrity of its Catholic schools. The Catholic trust would be a vehicle to shape and pioneer a new form of Catholic education, which would sustain and ultimately safeguard Catholic education in the long term.

What are the main differences between the CEO role and your previous role?

As a headteacher you're primarily focused on education and delivering school improvement, whereas in the CEO role you're the accounting officer, with responsibility and accountability for the wider corporate strategy and compliance, and making sure all the systems, structures and processes are efficient and fit for purpose. It's a significantly different role.

What have you enjoyed most about the CEO job so far?

I've found it very rewarding to secure a compelling vision that everyone understands, developing the narrative around that, and then promoting and sharing it across the trust.

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I've also enjoyed the process of continually learning since I took up the role. As CEO, I view myself as the lead learner, and I'm constantly looking for opportunities to develop my understanding further.

This has included reflecting and learning from my experiences, and being committed to my own professional development; for example, completing a masters in Catholic school leadership and the Executive Leadership Programme with the Said Business School, part of the University of Oxford.

Where do you feel you have had the greatest impact so far, and why have you been so effective in this aspect of the job?

I feel I've had the greatest impact by developing a strategy for the organisation that is centred on our vision. I think we've got a really strong vision statement as a trust, that is explicit, defines our end goal and informs everything that we're trying to do to fulfil the mission. We constantly come back to it as an organisation: providing opportunity for encounter, and in seeking excellence in everything we do.



Another area where I feel I've had a significant impact is in establishing an executive team who have genuinely bought into the culture of the organisation, are aligned to the vision, and who have the capacity and attributes to be able to deliver on the strategy and the vision. Recruiting people with different and complimentary skill sets and attributes has been critical to our success and I'm really delighted that we've been able to do that; we have a really capable team who are committed to delivering a strong service to our schools.

What have you learnt most since becoming CEO?

I've been humbled by the role and the enormity of it. I've also learnt that it's ok to have doubts, but the key is in how you manage those doubts in this position; you can't allow them to paralyse you, or stop you from taking swift and decisive action where you need to. Finally, I've learnt how important it is to learn and develop the new suite of skills required for the CEO role (which are very different to those needed to be a headteacher) in order to be able to manage and lead the trust effectively.

What has been the most challenging aspect of the job? How are you overcoming this challenge?

The most challenging aspect of the role has been managing the perceived loss of control and autonomy amongst some school leaders. The trust was established by the diocese of Nottingham in September 2018, and while there was a consultation with the schools who would be joining, the schools didn't have the choice of which trust they joined, or whether they joined or not. This is quite different from many trusts, where the schools themselves make the decision to join.

We have had to work really hard to secure buy-in, engagement, and alignment across our trust, despite the shared core values which come from the fact that all our schools are Catholic schools.

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We have worked to overcome this challenge through the shared culture we have established across the trust, building on the shared values and beliefs that guide every school within the organisation, and highlighting that commonality. The schools were operating individually before, but now we're working collectively as a trust to achieve a shared goal.

As leaders in the trust (as the CEO, and as other executive leaders) we constantly demonstrate our shared values through our words and actions and by seeking opportunities for solidarity and collaboration; finding as many opportunities as possible to work with people across the trust, so that everyone can understand their role within the wider trust, and gain a sense of participation and belonging.

What has been your greatest source of support and advice in taking on the role?

Firstly, developing broad professional connections that offer advice and support. For example, through the Forum Strategy #TrustLeaders network, local authority networks, and Catholic CEO networks.

At a personal level, you need somebody who you can speak to openly and honestly, and for me that is my parish priest, whom I can go to for spiritual guidance and personal support, which is very important to me as a Catholic CEO.

Finally, having a strong relationship with the Board has been crucial, because as well as providing challenge and accountability, they provide a great deal of guidance, support and expertise as well.

What is your top advice for those about to become CEOs?

Research the role thoroughly; make sure you fully understand the difference between school leadership and system leadership, and consider how you can apply your knowledge, skills and understanding at scale. I personally do not think that headship alone prepares you sufficiently for the role, so to lead effectively, a commitment to learning is crucial.



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The view from here

Professor Toby Salt - Forum Strategy Associate

Influencing, informing and engaging the influential as a CEO.



The past few months have been an intensive period of juggling competing demands and balancing risks and resources. Never before have great multi academy trusts shown their worth more. They have supported school leaders to prioritise their time, filtered and summarised conflicting and overwhelming advice, provided headteachers with essential expert advice and support – from site management to technology, and lobbied for additional resources and consideration. Meanwhile the academies are working hard to define and keep bubbles safe, catch up for lost learning time and trying to create a sense of normality for youngsters where much has changed and worried them.

I mention all this as I watch with admiration CEOs and heads skilfully making the right calls and being pragmatic and calm under intense pressure (even if underneath they are stressed and exhausted!) No one thought that they would be managing a pandemic when they stepped up to the plate to lead. This has led me to reflect on how I would have felt.

“I watch with admiration CEOs and heads skilfully making the right calls and being pragmatic and calm under intense pressure”

I believe that I would have been very stressed and worried too much (I always worry!) and managing and juggling the risks would have been exhausting. I think I would have been ok with the logistical issues and the intuitive, informed decisions - but I am far better in the shadows. I work hard to inform those who are making the decisions so that they are able to keep academy staff and students at the heart of what they do.

I have been reflecting, after nearly 40 years in leadership roles in education and having worked across the age phases, as a head, exec head, CEO of a large MAT; Deputy CEO of a NCSL and CEO of AQA: what have I learned and what might I share to support those working so hard at this time? Sir John Dunford, when he was the general secretary of ASCL, used to frequently support me and speak powerfully to newly appointed heads. I would push him to give a pithy message passing on his extensive wisdom and top tips. One thing he always said was that the key to great leadership required three things; ‘communication, communication and... communication’. I agree.

“the key to great leadership required three things; ‘communication, communication and... communication.’”

If the leadership during a pandemic has highlighted anything, it’s that communication is critical. Confused messaging (or messaging where actions are inconsistent) ultimately serves to undermine the message. That’s why school rules always have to be crystal clear – youngsters will find any ambiguity and exploit it – the same is true during a pandemic and restrictions.

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What it has also shown us is how important clear and authentic communication, laced with empathy and evidence is, when you want to demonstrate effective control and leadership. Humans want and need to know where they stand, and during times of crisis are happy to be led if they have confidence in the leader, and that is why communication is so important. I am not sure that at a national level this has always been the case, but at a school and trust level I have seen some exceptional examples. I am chair of governors in one established MAT, and the crisp, timely advice and communications have been exceptional.

So that brings me to my final point, and to the reference in the title of this article - how to inform and influence the influential. You may ask 'why bother?' As a CEO of an academy trust, part of your job is to ensure that those making decisions that will impact on your schools, and the communities that they serve, do it with the insight and information that they need. There is no point shouting at the TV or banging your desk in frustration if you haven't tried to engage and inform those that might be making the decisions. You are excellent at communicating with your parents and communities, but do you always reach out to national and local politicians, key officials and those that might be feeding evidence into the government machine to inform a policy position? How well do you know your local RSC? Does your local MP and councillor know you, and your school well?

"There is no point shouting at the TV or banging your desk in frustration if you haven't tried to engage and inform those that might be making the decisions".

When I was fairly new to headship one of my local MPs was a young MP for Bognor Regis – a certain Nick Gibb. He visited the schools and canvassed my opinions, and joined school lunches and events. That relationship still means that we hold each other with respect (even if we don't always agree) and we will reach out to each other - as and when needed. Again, it comes down to communication and relationships, like everything else in leadership. You must take the time to map out the key influencers and stakeholders around your trust – are there any you have missed? Have you worked out the best channel to communicate with them and foster the relationship? Another thing to consider is whether you engage a modest amount of specialist public affairs or media support. Certainly for me as a trust CEO the contract with a firm paid for itself in the fundraising events that they coordinated, but they also helped us to get the positive messages out, and to ensure that we had all our influencers tagged and informed.

At this time it will be hard to look ahead and outwards, but it is more important now than ever. Are you informing and influencing the influencers, and do you know who is making decisions locally and nationally on your behalf?

Stay well.

With enduring respect

Toby

Professor Toby Salt is a Forum Strategy Associate and an executive coach on the Being The CEO programme.



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CEO in Focus

John Brady - Schools Advisory Service



John Brady is a long-standing education sector leader, wellbeing champion, and entrepreneur. John is the CEO of Schools Advisory Service. He founded the organisation as a 'start up' in 1997, and it has now grown to serve over 4,000 schools nationally.

In this interview, John talks about his experience of being a CEO of over twenty years - growing a national organisation, bringing about a change in mindset around wellbeing, and creating an improvement culture based on 'customer service'.

What were the key influences in your life that led you to the CEO role?

The catalyst was an event that occurred thirty years ago. I was the national sales manager of a large insurance broker, and ten months into the year I was at a board meeting, and the board informed me that they'd made a mistake with my bonus. I was told that despite the fact I'd had a successful year, and I was well thought of, the bonus I'd been promised was going to be reduced by 90%. I stayed on for six more weeks, I got 10% of my bonus, and then I left, and at that point I decided two things; that I would set up in business, and that I would never treat people the way that I'd been treated.

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The experience taught me a vital lesson - that you've got to follow through on what you promise your people, and you've got to be true to your word. Trust has got to be at the foundation of your organisation, because once you lose that trust, it's impossible to get back.

"Trust has got to be at the foundation of your organisation, because once you lose that trust, it's impossible to get back."

Another key influence was a conversation I had with my father in 2003. It was the 20-year anniversary of the miner's strike, and I asked him, 'how did you deal with losing something that you had been so passionate about, and that you'd given so much of your life to?' He laughed and said, 'that's so you John, you're so competitive; but some things aren't about winning and losing, it's not that black and white. The most important thing is that you do the right thing, because when you look back, you can live with yourself.' That conversation really stuck with me, and it helped to give me the courage to set-up the Schools Advisory Service (SAS) in 2004 as a stand-alone business. It was a risk at the time, but I knew it was the right thing to do.



Today you run a large complex national organisation; what were some key steps you had to take in making the leap from being a small business owner, to CEO of a national multi-million pound organisation?

Planning and clarity were crucial, and also ensuring that everything we did played some part in feeding into our core plan. Lots of people think our core plan is to make a profit as a private company, but making a profit is a by-product; making a difference is what we do; and our clarity comes from continually asking, 'why do we do what we do? How will it make a difference?' And our core focus is on making that difference.

Becoming a chair of governors at a similar time to setting up SAS also helped to give me a better insight into schools, and helped to immerse me in what our clients were feeling. I was able to spend time in schools and with school leaders and learn more about their key issues and concerns. The most important thing for the CEO of any organisation is knowing about your clients, because that's who you're serving.

What were your key staff appointments on the journey to becoming a large national organisation, and what does your team do that you can't?

The team has changed as the business has changed and has grown, and as your trust grows you'll probably find that too.

All appointments are key, because every role should be making an impact. I would say one of the most crucial appointments that I made was Mandy, our head of nursing, who we hired back in 2009. Mandy was able to look at data and ensure that we were using our data for good, including looking at predictable absences, and where there was waste in the system.

"All appointments are key, because every role should be making an impact."

Mandy joined us on a six-month trial, and she's now just celebrated 11 years with us. Her whole department is made up of experts who all do things I can't, and includes nurses, counsellors, physios, GPs, a psychologist, a mindfulness expert, and a yoga teacher. Another key appointment was Gemma, who was a chemistry teacher before joining us; she gave us insight and an 'inside perspective' from her experience as a teacher, which has helped us to make our services as relevant as possible.

The important thing about the CEO role is it's not just about what you can do, it's about the resources you add, the capacity you build, where you make investments, and how you judge the impact.

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Where have you made mistakes in building your team and how have you learned from them?

The main mistake we made, particularly early on, was hiring people to fulfil a job role, and not focussing enough on potential.

That meant we faced a real challenge when dealing with change management, and that's when I realised that hiring on character is more important. Of course you need the key skills on your team, but you can teach skills to a large extent. When it comes to leadership or management roles, it's definitely more important to hire on the basis of a person's character and values, and to ensure that they are the right fit for your organisation.

Right now we're going through a crisis like no other. You've led your business through two recessions and a lot of political change through education. How have you managed that personally, and what has made SAS resilient throughout?

Even though we are a company that prides itself on planning, we obviously didn't have the challenges of 2020 included in that plan! It has been a real test of our culture and our resilience, and of everyone's commitment to working in a completely different way, while remaining focussed on our core purpose. I think 2020 has taught us that we have got our culture right. We learnt in real time how to adapt - we found solutions quickly - and we delivered because we stayed focussed on our core purpose of making a difference to our clients.

"I think 2020 has taught us that we have got our culture right. We learnt in real time how to adapt - we found solutions quickly - and we delivered because we stayed focussed on our core purpose of making a difference to our clients."

Not many good things have come out of Covid-19 as we know, but at SAS we've really extended our product as a result. We now do podcasts, we've taken on a mindfulness expert, and we've started providing online 'relaxation rooms' to help school staff to unwind from the stresses they are currently facing. Over the summer holidays we also covered

people who weren't covered free of charge, which is unheard of in the insurance world! Also we hope the importance of Health & Wellbeing we are all focusing on during a Global Pandemic is not lost in 2021 and beyond, as it's the no 1 priority for all individuals and therefore a lifelong lesson for all within schools, staff and pupils.

What are the ingredients of a good partnership and what are the lessons for CEOs there?

Partnerships are either transactional or transformational. If it's a transactional partnership it's never really going to make much of a difference, so don't expect transformational results from a transactional relationship.

To be transformational a partnership has got to be aligned to the goals of both organisations. Both parties also need to be invested in communicating with clarity, and to learning and growing together. The acid test for me is whether you celebrate the success of a partner – if it is a true partnership you will celebrate their success, because you've had some part to play in it. Ultimately, the partnership has got to make a real and positive difference for both parties in order to be truly transformational.

What has your experience as a CEO taught you about risk taking?

As a leader you are constantly taking risks - whether that's on a person you hire, or an initiative you didn't take up – there is risk in everything. Even failing to act is a risk. I think you get better at managing risk as you get more experienced, and you also learn to empower others to take risks in your organisation. With MATs, as you get more people around you, you create more risk, but you also share that risk with more people as your team grows. It's important to create a culture where you can accept a certain level of risk, and also accept that you won't always get everything right.

SAS is now working on staff surveys designed for trusts. Could you tell us a little bit about what a good staff survey means to you?

If you truly want to improve you have to find out what you're good at, and what you're not so good at. Staff surveys are important because if everybody's role is

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important, then everyone's opinion matters, and surveys are a great tool to enable you to see how things are in your organisation from the perspective of others.

All organisations are different, so staff surveys have to reflect that, and while 80% of the questions in staff surveys can probably apply to most trusts, around 20% of the questions should be unique to your trust, or even to each individual school, because one size does not fit all.

“Surveys are a great tool to enable you to see how things are in your organisation from the perspective of others”.

Before utilising staff surveys you should also reflect honestly on the motivation behind doing so – are you doing it to tick a box, or are you doing it to instigate real change? If you're using a staff survey as the basis of real change, the survey will just be the beginning of your journey. It will point you in the right direction, but the real change will come

from reflecting upon - and then acting upon - the results of the survey; that is the most important part. Otherwise you are just taking the temperature.

For those at the start of the journey, or those just a few years into the CEO role, what is your advice for thriving and surviving in the job?

You have to walk the talk, because whatever you do, people will follow your example. How you communicate what you're doing, what you're learning, how you look after your wellbeing, how you switch off, all of that is crucial.

Also, don't just look in the mirror for advice. It's very important to get out there and speak to the people in your organisation, and ask the right questions. You can learn from everyone, and it doesn't always have to be out and up, look below as well. The most authentic leaders know where to find the best answers in their organisation, and one thing that lockdown has taught us is just how important it is to have regular conversations with the people around us.



Horizon Happiness

By Nicholas Platt - founder and Managing Director of Henwood Court Chartered Financial Planners



I was chatting to a good friend of mine a few weeks ago, and he spoke of 'horizon happiness', a condition, if you can call it a condition, where we look to a life in the future when we will be happy. It does not imply you are not happy today, but it does imply you will be happier tomorrow.

This future, is different to today, because 'stuff' you dislike about your life today will be gone, and in the future, the horizon, when you will have achieved certain goals which often requires money, you will be doing or owning stuff that will allow you to live this happier life.

So, work hard today for jam tomorrow, because, we often tell ourselves *if you want to get to the end of the rainbow you need to put up with the rain today.*

Having thought about horizon happiness, I realise how I have been personally affected by this condition. You only have to read our company slogan – 'Creating Your Tomorrow' to understand this. I am driven to achieve, or perhaps, more accurately, I am driven not to fail. I am an avid goal setter, and when I achieve a goal I cannot celebrate too much because I still have to achieve the remaining goals on my list, and perhaps do not celebrate or appreciate the achievement of a goal. Will I ever be content – perhaps not due to the goal list, but I will never give up trying.

I see this in many of our clients. They too are driven. Driven in their business, career or personal and family goals. Driven to live or have a better life.

They often say 'I will be happy IF'...But when they achieve that IF they then move to the next IF – constantly progressing, but getting no closer to the horizon, because expectations keep rising, there is always another IF or another goal added to the list and as a result fulfilment, happiness and contentment will always elude them. A great question to ask yourself is:

'Ten years ago, if I offered you the life you are living today would you take it?'

Most people I have asked that question to will say yes! But they are now looking at the next ten years, not appreciating what they have, not being content.

I will be happy IF...

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In many ways I applaud this attitude as success cannot be achieved without drive or ambition, and goal setting is an essential ingredient to success.

BUT

What I have learned, but equally, need to keep reminding myself about, is:

Often, the chase is better than the catch.

I have built a business around helping clients achieve their goals. Some of these maybe material, a bigger house, a holiday home, or a super car, and often it is to reach a lifestyle that can be maintained without having to work. Often, the desire, hard work and planning for this dream is often more enjoyable than the actual achievement. Strange isn't it, but very common.

It is good to have goals, and to imagine and plan for a future where life will be happier, but not if this means not appreciating today.

We must take time to appreciate our time today, the things we do and the people in it.
To quote singer, song writer Sheryl Crow:

"Soak up the sun...it's not having what you want, it's wanting what you've got."

My book, Retireability is all about planning and living a fulfilling and purposeful retirement. But I pointed out that in doing so, you mustn't be looking out of the office window watching life go by, you must enjoy today as well. Time, our most precious asset waits for no one.

Interestingly, there has been extensive research carried out about at what age are people at their happiest. These suggest happiness generally follows a U-shaped curve, meaning happiness is high in your teens and early twenties, followed by a downturn in your late twenties attributed to rising anxiety levels, then rising again from your mid-fifties until around age 70 (although we have some very happy and content 70+ clients who would rightly dispute this). Much of these studies focused on wellbeing and contentment, and the majority of these cited financial security and independence as the driving force reducing anxiety and promoting wellbeing and contentment.

Money does not guarantee happiness, but once you understand that you have enough to afford the life you want to live, whatever happens, such emotions foster enormous contentment and removes the number one cause of anxiety.

This is the purpose of Henwood Court. To help clients, whatever their age, to be happier and feel more content through the creation and regular nurturing of a financial plan.

We do this through Financialsense®

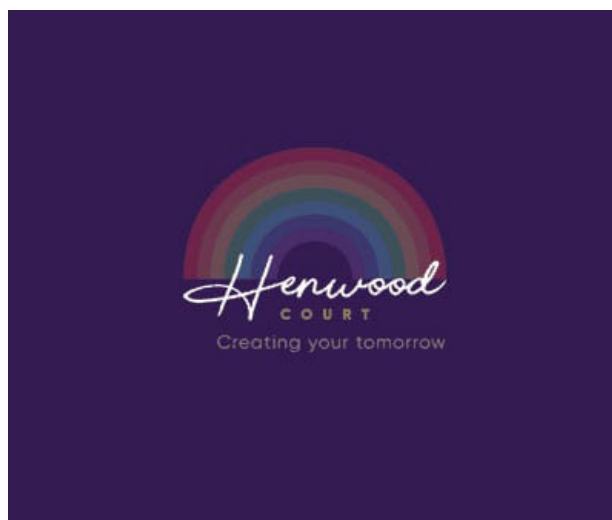
My challenge, and my challenge to our clients is not to wait for happiness, yes plan for the future but to also appreciate the moment and what you have today.

As we are gripped by this pandemic this is more important than ever. Yes, holidays and hobbies are on hold, and we cannot socialise as we would like to with friends and family, but at this moment we have the opportunity and time to do 'stuff' today that will not be possible to do when the new norm begins.

I would welcome your own thoughts on horizon happiness, it is a fascinating topic and so very important you understand this for your own wellbeing.

E-mail me your thoughts –
Nick.platt@henwoodcourt.co.uk

For me it is about appreciating the NOW!



#TrustLeaders

Introducing: Alice Gregson

Alice Gregson joins Forum Strategy in January as our new Chief Operating Officer.



Alice's main interests have firmly centred around understanding how people think and behave, beginning with undertaking a Psychology degree at Leicester University. After graduating, she knew she wanted to build on learning from her degree and took on a role as a workforce planning projects officer within adult social care and health, where she led initiatives to attract more people to social care jobs and careers.

During this time, she won a scholarship to travel to the USA to research how the system rewards and retains caregivers and even got to stay with a descendent of the famous President Franklin D Roosevelt – an interesting experience during the Obama-McCain election race!

After a few years, she joined the National College for School Leadership starting as a maternity cover managing the headteacher succession planning programme office and eventually securing a permanent position as equality and diversity lead for school leadership. To this day, Alice cites her time at NCSL as her best employment to date due to the inspirational and charismatic leadership team and friendly, dedicated work colleagues. She says, *'a positive, nurturing work culture for me is a non-negotiable – it's essential to feel appreciated and respected at work. I really value being part of a great culture but it's also important to me to help to create one wherever I go too'*. This was her first role working in education and it has made a lasting impression. The opportunity to work with leaders in a sector undertaking such important work, Alice describes as a privilege. She says, *'I have always sought out roles related to public services, particularly those services that are some of the most challenging. The way I see it, is that our public workers are the beating heart of society and in my own small way, I get to contribute to the fantastic work they do and make my own difference in the world – it's important to do work that's meaningful.'*

Shortly after the changes to NCSL came about through the takeover from the Department of Education, Alice moved roles to work as a cohort leader for 50+ Civil Service Digital and Technology Fast Stream participants.

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The programme was a three-year leadership acceleration programme across multiple CS departments and Alice's role was to manage, coach, mentor and enable her cohort to make the most of the opportunities on offer. Many of these participants have since moved into senior civil service leadership roles. However, whilst the role was rewarding and certainly challenging, the internal work culture was not the right fit and the time was right to move on to Alice's latest role at the College of Policing, from which she moves to join Forum.

Alice started out leading the delivery of police leadership review recommendations across the national police service consisting of 43 forces across England and Wales and then more recently (in 2019), was seconded to the National Police Chiefs Council to help to deliver the Prime Minister's promise to recruit 20,000 new police officers over three years. She has been the national Uplift Attraction Lead for the past year and has delivered national recruitment campaigns with the Home Office, trained leaders from across 43 forces, developed virtual events software, and more besides.

Alongside this very challenging role though, Alice was keen to keep with her desire to return to education and also carried out programme management consultancy work with Trust leaders alongside her full-time policing role.

So this takes us up to now where we see Alice join Forum which she describes as an incredible opportunity and one she's very excited to begin in January. This is what Alice had to say about Forum and her new role as COO:

"I am absolutely over the moon to start working with the fantastic team at Forum Strategy. I know some of the team from my previous roles, and met other team members just recently and I can honestly say, I can sense this will be a positive, committed and inspiring work culture to be part of and contribute to. In my new role, I will bring with me extensive programme and project management experience, an eye for detail, coaching and leadership experience, and passion and an

absolute unwavering commitment to do the best by our members, partners and colleagues across education. Forum Strategy is clearly a 'values first' organisation, and I look forward to playing my part'

On a final note, Alice talks about her desire to meet as many of you as possible as she starts her role in the new year. She is keen to attend events, meetings, discussions and much more so she can ensure in her role at Forum, she is always up to speed with the latest needs and developments across Trusts. Alice says, 'the role of Trust CEOs is such an important one, and just as I have in all my other roles to date, I want to do my part in contributing to the fantastic leadership that goes on across education daily. I look forward to meeting you virtually (and I hope face to face in the not too distant future) and doing what I can to work alongside Michael and the rest of the team to ensure that Forum Strategy continues to be a great organisation to be part of for its members'.

One of my favourite quotes to end on: ***"Never doubt that a small group of thoughtful, concerned citizens can change the world. Indeed, it is the only thing that ever has."*** - Margaret Mead

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National #TrustLeaders CEO Network Dates

Please see below confirmed dates for upcoming CEO Network meetings from the New Year – July 2021. Please note that attendance at these events depends on renewals being confirmed at the time they are due, with renewal dates for members varying.

10th February 2021, 9.15am – 12.30pm (Online)

17th March 2021, 10am – 3pm (Alternative Date 1 – Reading)

18th March 2021, 10pm – 3pm (Alternative Date 2 – Huddersfield)

23rd June 2021, 10am – 3pm (Southwell, Nottinghamshire)

National #TrustLeaders COO Network Dates

Please see below confirmed dates for upcoming COO Network meetings.

Tuesday 19th January (9.15 – 12.30)

Wednesday 4th March (9.15 – 12.30)

Thursday 12th May (1 – 4pm)

Thursday 7th July (1 – 4pm)

#TrustLeaders Chairs of Trustees Seminars

These seminars are open to all Chairs of trusts where the CEO and/or COO is a current member of the National #TrustLeaders Network. Each session is run online. (Please note that access to the seminars will depend on renewals being confirmed at a certain point, depending on the date your CEO originally joined #TrustLeaders.)

13th January 2021 (4pm – 5.45pm)

3rd March 2021 (4pm – 5.45pm)

28th April 2021 (4pm – 5.45pm)

16th June 2021 (4pm – 5.45pm)



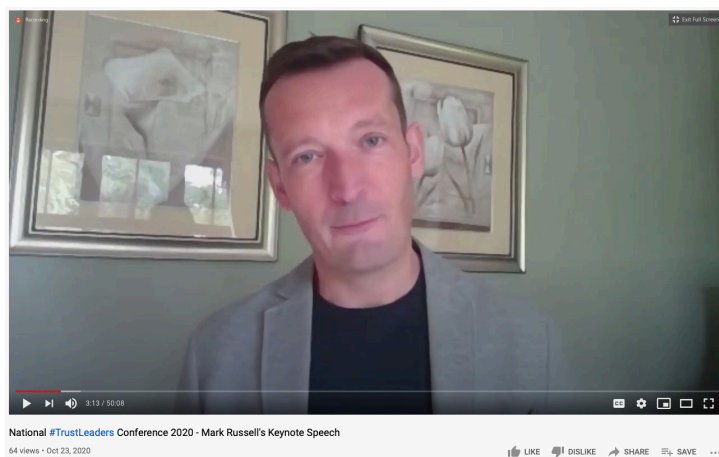


You can access Forum Strategy's latest YouTube video's through our YouTube channel:
Forum Strategy - YouTube



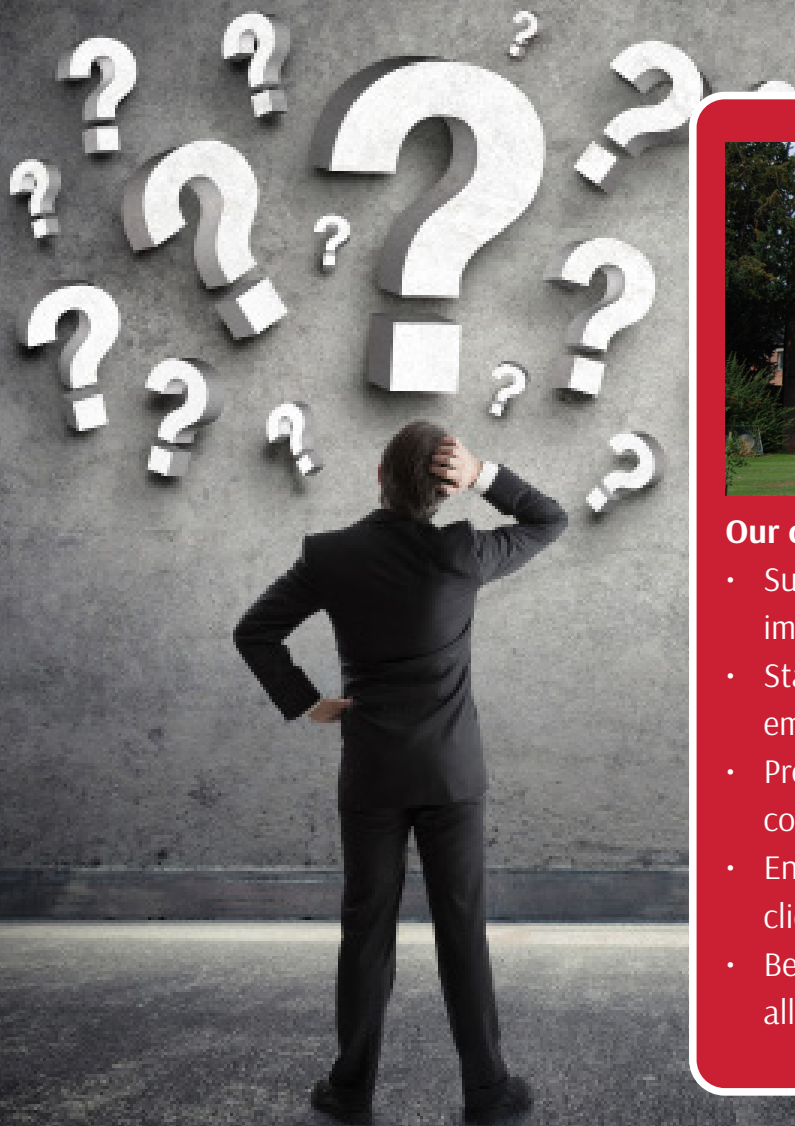
#BeingTheCEO in 2020. Reflections ahead of the National #TrustLeaders Conference 2020. - YouTube
<https://www.youtube.com/watch?v=HHGRHMRnVmQ>

Michael Pain's Keynote Speech to the National #TrustLeaders Conference 2020 - YouTube
<https://www.youtube.com/watch?v=KUYjc1QggvI>



National #TrustLeaders Conference 2020 - Mark Russell's Keynote Speech - YouTube
<https://www.youtube.com/watch?v=ZIXgEloxBBc>

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Our commitments to clients include:

- Supporting organisational improvement wherever possible;
- Staying informed on the key & emerging issues;
- Producing high quality research & communications;
- Ensuring our integrity & maintaining client confidentiality at all times;
- Being responsive & professional in all that we do.

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