

# Making the case for joining a 'thriving academy trust'

Thriving Trusts Thinkpiece Series

January 2023

## About Forum Strategy

Forum Strategy is a national membership and consultancy organisation supporting CEOs, COOs, and executive leaders, with a particular focus on those leading academy trusts. Forum Strategy's thought-leadership, national networks, and annual conference for Chief Executives has ensured it is a sector leader, informing the sustainable development of the academy trust sector through harnessing the views, experiences and ideas of CEOs and experts from within and beyond the sector. Forum Strategy was established in 2013.

Below we introduce the concept of a '**Thriving Trust**' and we will share more thinking around this following wider consultation with CEOs and the sector in the coming weeks. The imperative behind a shift in language is that – in contrast to the language of effective or strong trusts, which may feel quite mechanical or top down - we need to bring schools, staff, families, and communities with us in growing trusts and, indeed, nurturing the trust sector as whole. So, together, we will develop principles and a deeper understanding of what it means to be a **Thriving Trust** where all feel connected, understood, supported, and inspired to flourish in a changing and challenging world. We also know that for so many, sustainable, ethical growth is a core part of being able to fully thrive, and this emphasis will remain at the heart of our discussions.

## **Introduction**

Despite a renewed impetus last year from the government to achieve full academisation by 2030, the pace of trust growth has not been remarkable, and policy – following the demise of the Schools Bill – has, again, gone very quiet. Many trusts need to grow if they are to become fully sustainable, reaching their full potential for educational transformation and school improvement at scale across their localities for the years ahead. Many are driven to make an even bigger difference as soon as possible.

Yet, the impact of the COVID pandemic, together with a lack of strategic implementation by government, has seen trust growth generally slowdown in recent years. This appears to be the case, particularly in many areas where local authorities (LAs) were recently encouraged to develop their own trusts, with many schools who were readying themselves to join trusts instead choosing to ‘wait and see’ what will happen around local academisation, and how the dynamic between trusts and LAs will play out locally.

Indeed, the number of academy trusts has been fairly stable since August 2019. Yet, despite the increasing stability of the offer available to those schools looking to become part of a trust, the typical trust has only grown from 6 schools to 7<sup>1</sup>. 81% of MATs run 10 schools or fewer, and around half of MATs run between two and four schools. Only 28 MATs are made up of more than 30 schools. It is therefore key for trusts looking to grow that they have much more support in ‘*making the case*’ to schools for being part of an academy trust - balancing passion and enthusiasm for growth with a commitment to sustainable success and development.

**This is the first in a series of papers this year by Forum Strategy setting out how we make the case for ‘Thriving Trusts’ and what will ensure trusts become a fully embraced part of the educational landscape. In doing so it is key that the system challenges trusts to be even better and to fully realise the wide range of potential benefits the model offers for their children, staff, and communities. A paper setting out the principles that could potentially define a ‘Thriving Trust’ will be published next month. In the meantime, this piece provides a number of key ways in which trusts can ‘make the case’ to schools, and to parents and communities (drawing on Michael Pain’s 6 areas of organisational development<sup>2</sup>) for why joining an academy trust can be a very positive step.**

Of course, individual schools will always be initially keen to understand the financial commitments such as the ‘top slice’, the implications for the scheme of delegation and local governance, the degree of school-level autonomy over the curriculum, and other such things. Each trust will have its own approach. Yet boards and CEOs also need to ensure the benefits are understood in a fuller context. What this paper intends to do, is to help trusts demonstrate why some investment and compromise – whatever that may be in an individual school’s case as they join – can underpin wider benefits for schools. Some benefits will be much more obvious than others, but many will, over time, enhance the education and development of pupils and the working lives of staff.

The paper provides some suggestions on what CEOs and boards need to demonstrate to potential joiners, and how the trust can demonstrate a commitment to ‘pure accountability’ in doing so

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<sup>1</sup> <https://www.gov.uk/government/collections/ofsted-annual-report-202122>

<sup>2</sup> <https://www.johncattbookshop.com/being-the-ceo-the-six-dimensions-of-organisational-leadership>

## **Six key areas for 'making the case' for academy trusts**

It is inevitable that each trust will be asked about the detail of the financial implications (such as top slice), scheme of delegation for governance, degree and nature of school-level autonomy v. central prescription, and many other areas. These are particular to each trust, and fundamentally important considerations. They are not, however, the whole story, and boards and CEOs must seek to move the conversation beyond this - demonstrating their values, vision, strategy and how the operations of working in partnership and at scale provide multiple benefits and opportunities to overcome key challenges. This is perfectly possible for many trusts who are working hard in their journey towards becoming **Thriving Trusts**. Trusts can demonstrate their progress and potential by covering the following six areas for 'making the case', which are explored in more detail in the paper:

- As a collective, we have the opportunity to shape **a vision and strategy that galvanises our community and our locality**, bringing people together around serving the next generation
- Through **shared governance at board-level**, and through the work of local governing bodies, we can potentially generate greater support, accountability, and professional- and social-capital
- Our ability to create **the culture, capacity and systems for school-to-school improvement at scale**, means the expertise, support and opportunities available to individual schools becomes even greater
- With scale and diverse central expertise, alongside the ability to work together and co-ordinate support across schools, we have even **greater opportunities to be an employer of choice**
- Our scale and understanding of our schools' needs means **we can do more to maximise public funds, generate income to the benefit of pupils, and work towards a more environmentally sustainable future** that pupils and communities wish to see
- Where our local identity and the scale of our reach meet, **we can be at the heart of our communities, providing a focal point for strategic partnerships that maximise opportunities for children, staff and schools** across an area

# 1. As a collective we have the opportunity to shape a vision and strategy that galvanises our community and our locality, bringing people together around serving the next generation

Many trusts are deeply committed to serving their area and locality. Some proudly bear the name of their town or region. They employ thousands of people from across the vicinity and actively develop partnerships with employers, charities, sports clubs, health bodies and other agencies – through a strong sense of place. **Thriving Trusts** are deeply aware and mindful of the educational, social, and economic needs and challenges of their areas, and galvanise social- and professional-capital around serving the next generation. They often generate public accountability (or pure accountability<sup>3</sup> as we describe it) within their localities to ensure they are delivering upon their vision and commitments, creating a healthy counterbalance to top-down expectations and accountabilities that can otherwise readily dominate agendas. Trusts are also liberated and distant from local party politics and the churn of town hall policies, placing independent trustees and professional people in the position of setting vision and direction. In doing so, **thriving trusts** involve their schools, staff, pupils and communities on a regular basis, through genuine participation.

CEOs and boards can make a case by:

- Demonstrating how their vision reflects the aspirations, needs and expectations of their locality; including how this is informed by local communities, families and strategic partners working across the area.
- Demonstrating how they hold themselves to account against this vision, including to their individual schools, parents, and pupils.
- Demonstrating how individual schools and staff can contribute to this vision and the strategy beneath it, and how it reflects their needs and their sense of place.
- Demonstrating how local partnerships, generated by and forged through the collective vision, add to the life and work of individual schools across the trust.

## Pure accountability

**Pure accountability means demonstrating a commitment and impact beyond what government itself expects or measures. Pure accountability to communities, staff and pupils is a key principle of a **Thriving Trust**. How does the trust make itself genuinely accountable against its vision, to staff, parents and the community. Can it tangibly demonstrate this? Further reading on this can be accessed at:**

<https://forumstrategy.org/its-time-for-a-purer-more-community-focused-notion-of-accountability/>

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<sup>3</sup> <https://forumstrategy.org/its-time-for-a-purer-more-community-focused-notion-of-accountability/>

## 2. Through shared governance at board-level, and through the work of local governing bodies, we can potentially generate greater support, accountability, and professional- and social-capital

Academy trusts have provided an opportunity to ‘pool’ high quality governance expertise so that it benefits more schools and more pupils. It is a fact of life that it is impossible to achieve the standards expected of trust-level governance in over 20,000 individual schools nationwide. **Thriving trust** boards mean that great governance – reflecting deep professional experience and expertise across a whole range of disciplines - can have a direct influence on more schools. This is because trust-boards, due to the scale and influence they have, can more easily attract people who have deep professional expertise in areas such as HR, finance, school improvement, technology, site management, marketing, and more. It is also very often possible to employ a governance professional at trust level to support the effective working of the board across a complex, demanding and, often technical, remit. This is hugely beneficial. It also allows local governing body members to focus on the things that really matter to them, which may include school culture, community partnerships, fundraising, and parental voice. Yet, governance in trusts is often a sticking point for schools joining, often, through fear of losing local governing body autonomy. Therefore, it is important to acknowledge and address those concerns in the following ways.

CEOs and boards can make a case by:

- Demonstrating the level and breadth of expertise that sits on the trust-board and how this contributes directly to school improvement and high-quality support services centrally, such as effective strategy, financial oversight, compliance, and more.
- Demonstrating the freedom that local governing bodies have to focus on areas that matter to them, liberated from significant administrative discussions.
- Demonstrating the challenge that the trust-board provides to the CEO and central team to ensure the highest standards of support services for schools.
- Demonstrating the links and passion that trust-board members have for the community the trust serves. It is important that potential joining schools meet trustees, especially the Chair, at an early stage.
- Demonstrating how the work of the board and central team complement each other, and fears amongst individual school leaders and staff of overlap or having ‘multiple masters’ are allayed.
- Demonstrating how the expertise and rigour of the trust board can protect individual schools through effective risk management and oversight of compliance
- Demonstrating how the trust board take into account the views of local governing bodies and how it communicates with them

### **Pure accountability**

**Do the members regularly commission an external review of the trust-board, and does the trust board make this public in order to demonstrate its strengths and weaknesses? Are the trustees visible and active within the local community? Are some of the board’s measures of success for the trust based on determining the views of staff, parents, children and even other local stakeholders?**

### **3. Our ability to create the culture, capacity, and systems for school-to-school improvement at scale, means the expertise, support and opportunities available to individual schools becomes even greater**

Getting improvement at scale right is at the heart of the academy trust model. Whether a headteacher, senior leader, teacher or other member of staff, the support and opportunities offered by the trust should be felt by all. This means schools should be confident that the people advising them on improvement and good practice are experts in their field, who constantly review and test their own thinking to remain at the top of their field. It also means being assured that such support is readily available when schools need it. Individual schools will also want to know that they can draw on sophisticated data management and intelligence to compare and contrast their strengths and weaknesses with others, and feel part of a culture that is safe and generous in facilitating the sharing of ideas, challenge and support based on that data. Indeed, data is predominantly used in a formative way in **Thriving Trusts**. Many trusts are now using peer review as the bedrock of their improvement culture, ensuring that schools both own their improvement journey; but that this is also reinforced by central team expertise, and ongoing collaboration and mutual support across schools over time. Although particular to individual trusts, there will be a need to provide a rationale for curriculum prescription where it exists, and how this underpins shared assessment and the sharing and refining of resources and practices across schools. In any case, individual schools must be inspired and buy into a clear definition – provided by the trust - of what it means by ‘quality education’ and ‘quality improvement’.

CEOs and boards can make a case by:

- Demonstrating the level of expertise of the school improvement and central education team.
- Demonstrate that the culture of school improvement across the trust is predominately formative, where individual schools can feel a significant level of ownership of their improvement journey and also in supporting others through a peer-to-peer approach.
- Demonstrate that schools can access high quality, timely and triangulated data to inform their improvement practices, and to reach out to others in order to provide or receive support.
- Demonstrate that expertise and support provided by the central team or other experts can be accessed in a timely and fair manner.
- Demonstrate the opportunities for staff at all levels to develop their professional expertise in order to contribute to wider improvement across the trust.
- Make the case to parents that this is not a deficit model, and that by being part of a bigger ‘whole’, individual schools can benefit from greater access to advice, expertise, support, and constructive challenge.

#### **Pure accountability**

**Is the trust able to monitor and show that staff value the central support services and wider school improvement expertise? Is it able to demonstrate how parents’ views of schools and school leadership has improved over time, through its support? Is it able to**

**demonstrate how it is engaged in MAT to MAT review in order to understand the strengths and weaknesses of its school improvement model?**

#### **4. With scale and diverse central expertise, alongside the ability to work together and co-ordinate support across schools, we have even greater opportunities to be an employer of choice**

It is very challenging (though not impossible) for individual schools or those trusts operating with schools at great distances from one another to maximise the opportunities for being an employer of choice. **Thriving Trusts**, especially those that are locally based or in hubs, are able to mitigate workload and create a culture of support by establishing professional networks across local schools where staff can share resources, advice or provide mutual support. This is an essential retention strategy when workload remains one of the predominant reasons for teachers leaving the profession. Trusts can also invest – using their scale and purchasing power - in centrally provided benefits, such as high-quality professional development or by negotiating economies of scale for potential benefits such as, for example, subsidised childcare, discount cards with local businesses, or wellbeing services. **Thriving Trusts** can use their model to provide greater flexibility, because they can move staff around schools to provide cover, or to facilitate a degree of part time working or emergency leave. For headteachers and those with senior responsibility, having direct and timely access to those centrally with significant operational expertise in areas such as finance, HR, health and safety, technology and elsewhere, is not to be underestimated – especially given the impact recent crises have had on headteacher retention.

CEOs and boards can make a case by:

- Demonstrating the additional support offered to staff through professional networks – including the sharing of resources through online portals; access to opportunities to develop resources; and access to expertise and support from specialists within the trust.
- Demonstrate the central expertise and resources available to headteachers and senior leaders, especially in areas outside of teaching and learning expertise, that can often cause stress and anxiety when there is a crisis or unexpected incident.
- Demonstrating the opportunities for staff at all levels to undertake high-quality CPD, and potentially take on leadership responsibility or an area of trust-wide specialism/expertise.
- Demonstrating access to areas such as centrally provided wellbeing services, potential discounts or vouchers with local retailers, childcare subsidies, and meaningful flexible working policies etc.

#### **Pure accountability**

**Is the trust able to show how levels of staff satisfaction and engagement compare with other major local and regional employers? Is it able to demonstrate high levels of staff retention, low levels of staff absence, and a deep understanding of why people leave the trust (based on exit interviews and survey data)? Can the trust show the impact of its professional development offer, and demonstrate how leaders and teachers have progressed?**

## **5. Our scale and understanding of our schools' needs means we can do more to maximise public funds, generate income to the benefit of pupils, and work towards a more environmentally sustainable future that pupils and communities wish to see.**

The academy trust model provides the scale and the opportunity to make public money go further, so more of it benefits pupils. Yes, there are opportunities for economies of scale, which in these tight times become even more appealing to individual schools. The opportunity, for example, to negotiate lower energy rates, supply agency fees, technological devices and support, extra curricula activities for pupils, and much more, based on scale is evident. Yet, it also provides the opportunity to strategically pool and invest funds in services that once developed eventually benefit all schools. These may include, for example, developing in house educational psychology services, technology support services, and catering provision across the trust schools. Indeed, these services can not only be developed to a high standard that the trust expects for its pupils and cut the cost of going to external consultants and providers; they can also potentially be traded – ensuring these high-quality services reach more pupils and generate more funds to invest in resources for pupils in the trust. Being part of a **Thriving Trust** makes things like this possible, and can ensure that schools pay less and get more in the long run, whilst having a greater say in the provision provided. Trusts can also use their central capacity to be more strategic about accessing funding and grants opportunities – potentially through central bid-writing expertise.

Alongside this sense of collective investment to generate savings and quality over time, is the need to demonstrate a commitment and ability to ensure the trusts sites and ways of working become more environmentally sustainable, as individual schools look for support and advice on how to do so in response to growing pupil, parental and community expectations.

CEOs and boards can make a case by:

- Demonstrating how the trust invests central funding to improve and enhance the provision available to schools and pupils.
- Demonstrating savings that trust schools have made over time through central procurement.
- Demonstrating how it is responding to the needs of schools by investing in new and centrally delivered services to meet these, mitigating the costs of using external providers
- Demonstrating how the trust uses its central support and advice services to access funding and grants to the benefit of individual schools
- Demonstrating how the trust uses its scale and community partnerships to generate a culture of volunteerism to provide additional capacity and expertise for schools.

### **Pure accountability**

**Is the trust able to show how it is minimising the cost of certain services through central procurement, and how far this goes to off-setting the top slice paid by individual schools?  
Is the trust able to show how its central services meet individual school's particular needs,**



enhancing their ability to respond and mitigating the costs of external contractors and suppliers? Is the trust able to demonstrate an environmental sustainability strategy, and how this will reduce energy dependency and carbon footprint in the decade ahead? Is the trust able to demonstrate the value of fundraising and grants it has been able to achieve, and to what extent that has benefited individual schools?

## **6. Where our local identity and the scale of our reach meet, we can be at the heart of our communities, providing a focal point for strategic partnerships that maximise opportunities for children, staff and schools across an area**

As a **Thriving Trust** that has a strong local or regional identity, representing numerous schools and potentially thousands of staff, and tens of thousands of children, there is a huge opportunity to draw on and generate social- and professional capital that enhances the work of individual schools. CEOs are key to instigating this, drawing on the vision and values of the trust to engage stakeholders including local employers, health bodies, charities, and others who can make a difference to children and young people's lives. It is very challenging at an individual school level to make all these connections, but through the trust model, there is opportunity for schools to readily access the benefits. This can include the opportunity for employers to inform the curriculum, to inspire through assemblies and visits, and to provide work experience; for health bodies to work in conjunction around key issues such as mental health support and signposting locally; for sports clubs to contribute to the physical education and healthy living aspects of the curriculum; and for charities to work in conjunction with schools and the trust around mitigating the impact of the cost of living crisis.

Being part of a **Thriving Trust** can in turn also help raise the profile of schools in the community, through access to a wide range of local partnerships and media coverage, demonstrating their impact and the difference they make and celebrating the work of staff and pupils.

CEOs and boards can make a case by:

- Demonstrating how key local, regional and national partnerships contribute towards areas such as enhancing the curriculum and learning; to supporting mental and physical wellbeing; and fundraising. How would individual schools benefit in a way they do not do so now?
- Demonstrating how links with charities and health bodies can help schools access key services and signpost families to the necessary support.
- Demonstrating how the trust can elevate the profile of the school, helping them to develop their own specific partnerships, and celebrating the impact of pupils and staff.

### **Pure accountability**

**Is the trust able to demonstrate its commitment to area-wide partnership through seeking the views and feedback of key partners? Is the trust able to quantify the impact that partnerships have had on the curriculum, both core and extra-curricular? Is the trust able**

to demonstrate the impact that its partnerships have had on the health and wellbeing of pupils?

**This is the first in a series of papers this year by Forum Strategy setting out how we make the case for 'Thriving Trusts' and what will ensure trusts become a fully embraced part of the educational landscape. A second paper setting out the principles that could potentially define a 'Thriving Trust' will be published later next month.**

### **Further Reading**

- [It's time for CEOs and boards to reconceptualise what we mean by trust 'growth' | Forum Strategy](#)
- [Being The CEO; The Six Dimensions of Organisational Leadership \(Pain, 2019; John Catt Educational\)](#)
- [PURE ACCOUNTABILITY: An accountability vacuum? Let's shape a purer, more community-focused alternative. | Forum Strategy](#)