



Department
for Education

School and Trust Business Professional Practice – making a difference

Research report

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**Authors: CooperGibson Research and St.
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Acknowledgements

Research team:

Sarah Gibson, CooperGibson Research

Ruth Watts, CooperGibson Research

Rebecca Atkinson, CooperGibson Research

Catherine Carroll, St. Mary's University

Stephen Vainker, St. Mary's University

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Executive Summary

As part of their commitment in the 2022 School Resource Management Strategy¹ to research good practice and share findings with the sector, the Department for Education (DfE) commissioned CooperGibson Research (CGR) and St. Mary's University, to conduct qualitative research exploring school and trust business practices. The research aimed to better understand:

1. The practices which successful multi-academy trusts (MATs) find most effective for managing school resource and adding value, including how they (a) identify the practices, (b) access the business capability, and (c) implement those.
2. How school and trust business professionals with responsibility for finance, procurement, estate management, human resources and marketing and communications gain, develop, demonstrate and maintain capabilities (as manifested by skills, experience and knowledge) in these areas over time.

In-depth interviews were conducted with 103 business professionals, from 24 MATs across 73 interview sessions. The majority of the interview participants were based in trust central teams, five were school based.

Throughout this report, several terms are regularly used as part of the findings. Many of the key terms used have been informed by the Institute for School Business Leadership (ISBL) Professional Standards.² The standards framework sets out the six main professional disciplines of school business leadership, which are:

- finance
- procurement
- estate management
- human resources (HR)
- marketing and communication
- operational leadership

In the report, these disciplines are described as functions, for example, the procurement function. Each function has a set of tasks that a MAT will carry out as part of that function. For example, conducting a needs analysis, is a procurement task. Finally, the term 'practices' is used to describe the how, or the ways, in which the MATs were

¹ Department for Education. (2022). [School Resource Management: Building a stronger system](#).

² Institute of School Business Leadership. (2023). [Professional Standards](#).

carrying out the tasks of a function. For the procurement function, for example, a practice might be the use of a specific software programme to support the submission of tenders.

Key findings

Common practices across the functions

All the interview participants reported that the direction of travel in their MAT was to align a variety of business practices across schools if there were clear benefits for the MAT and where resources allowed for this alignment. Alignment was being achieved through, for example, the automation of tasks such as finance and payroll and in how central and school business teams were being structured around the business functions to implement this greater alignment.

There was a trend to bring the implementation of tasks in-house, whenever there were strong incentives to do so, such as, to make financial savings and/or to develop the expertise of central team support. This was combined with a trend towards employing business professionals with industry level qualifications and experience, whether that be, for example, in HR, marketing and communications or finance.

According to the participants, these practices added value in several ways. Almost all the participants could point to efficiencies in time and associated cost savings being made in the short and/or long term. The practices were reported as being effective as they facilitated greater consistency and accuracy, such as, through the implementation of aligned finance processes. Participants could describe how many of the practices, indirectly, supported pupils' development and learning, through for example, reducing some of the business operation workload of senior school leaders to allow them to focus on teaching and learning.

Notwithstanding the similarities in these overarching trends, there was considerable variation in the detail of the practices. There was not a 'one size fits all' approach to effective practices. Variations were evident in, for example, the types of commercial software programmes used to automate the finance, HR or estate management functions. The precise structure of central teams differed between MATs, as did the balance of the roles and responsibilities between central and school teams around a specific function.

The analyses showed that the participants and their central MAT teams, were very sensitive to the tensions of how aligning processes and systems might be experienced by schools seeking to retain their autonomy and individuality. Therefore, participants spoke of the importance placed by central teams on collaborative working (formally and

informally) and the need for very clear communication on the rationale for when and how to embark on system wide business function changes.

Finance function

The most common financial practices, that add value, reported by MATs of all types and sizes, were concerned with aligning and automating finance tasks through: having one central bank account for schools in the MAT; using the same financial software; having one invoicing process; and implementing integrated curriculum financial planning (ICFP). There was evidence of some variation in the roles and responsibilities between central and school teams in how these practices were implemented, but aligning and automating many of the finance tasks had resulted in four main benefits.

First were reported financial savings, such as, reduced auditing fees from having just one bank account. Second, was more effective practice as alignment and automation had facilitated more consistent financial management practice, accurate reporting and financial forecasting, and therefore, more informed financial decision making. Third were efficiencies with time, including for headteachers, with less time, for example spent and preparing financial reports. Finally, MATs who were using ICFP described how the process had meant more informed and collaborative curriculum and financial decision making and, it supported pupils' development and learning by putting curriculum requirements at the centre of financial planning.

Procurement function

The four main procurement practices which were reported to add value to the work of a MAT were: aligning procurement processes across a MAT, such as having trust wide procurement of contracts and having a central contracts register; improving the approach to needs analysis when procuring a new contract; considering the advantages and disadvantages of using in-house and external sources of support for the procurement process; and ensuring more strategic management of suppliers and contracts.

Procurement tasks were, in the main, carried out by the central team and the main benefits of aligning tasks were: financial savings from being able to procure at scale; efficiencies in time as school staff did not have to spend time on administration; and central teams having better data from which to make informed strategic decision making around procurement in the longer term.

Human resources function

The three main reported HR practices, that add value to the work of a MAT were: aligning the structure of HR central and school teams across a MAT; integrating and automating

the HR and payroll systems; and the introduction of coaching as an approach to professional development.

There was evidence of some variation in the roles and responsibilities in how these practices were implemented. Some of the larger MATs, for example, reported moving all HR functions completely in-house, usually with the appointment of a highly qualified HR specialist in the role of HR Director. Other, often smaller MATs used external consultants to support the HR function. However they were implemented, the alignment of HR tasks across a MAT had been effective with ensuring more effective HR practices through for example, more consistent approaches to recruitment. Financial savings and time efficiencies were the main advantages of integrating and automating the HR and payroll systems, with for example, less time spent running analyses and reports. Finally, although the introduction of coaching was relatively new in settings, the main benefits were that by targeting and personalising support, staff would not only improve performance but would feel more valued in their role.

Estate management function

The three main estate management practices that participants said added value to the work of a MAT were: aligning the structure of central and school estate teams across a MAT; automating estate management tasks; and implementing sustainable practices.

Although there was a trend towards aligning estate management tasks, how estate teams were structured to deliver that function varied. One structure was to have an estate management lead in the central team and a premises manager on each site. Another approach was to have a bigger central team that comprised of one or more professionals qualified in different areas of construction. Employing such expertise in a central team brought value by, for example, saving on costs for contracting some of the routine estates work.

Automating some procurement tasks meant greater effectiveness in that, for example, the central team had a clearer understanding of the condition of the whole MAT estate, which in turn ensured higher levels of health and safety. Sustainable practices, such as installing light-emitting diode (LED) lighting resulted in financial savings, and the implementation of a food recycling scheme had been integrated into curriculum, thus benefiting pupils' learning and environmental understanding.

Marketing and communications function

Marketing and communications was the least developed of the functions. Nevertheless, there were two emerging common practices. These related first to aligning marketing and communication tasks, and second, with supporting staff recruitment and retention.

For the most part, many of the participants reported outsourcing support for the marketing and communications function. However, there were some examples where MATs had started to employ a professional with a relevant background to work in a central team and provide support to schools. The value of such an approach was primarily cost efficiency and access to expertise, as it gave many schools access to marketing and communications advice that they ordinarily would not be able to afford.

The value of some marketing and communication activities was in their contribution towards supporting a MAT's recruitment and retention strategy for staff and pupils. Examples of practices included using social media platforms for positive stories related to the MAT, rather than for job advertisements, and reviewing website content and presentation, with a focus towards how different communities might use and interact with these platforms.

Operational leadership function

Unlike the specialist business functions described thus far, operational leadership is concerned with leading operational planning across all the functions, to ensure effective and sustainable resource allocation to maximise outcomes for pupils. The four main tasks are: managing people and stakeholders; governance and accountability; managing risk; and innovation and change management. The operational leadership function is the responsibility of the MAT professional who has oversight of operations. Chief Operating Officers (COOs) took part in the interviews.

The main operational leadership practices reported by participants that add value, were approaches to managing risk, and community engagement innovation initiatives. Participants described the benefits, for example, of automating the Risk Register, such as, efficiencies with time by being able to quickly compile complex reports for trustees and external scrutiny. Additionally, they described how the quality of discussions, such as those around risk that went alongside the use of the software, was of equal value. The use of a software programme allowed more time for these key discussions.

There was some evidence of innovative practices around engagement with the community through, for example, joint running of community libraries, supporting sustainability and developing partnerships with local employers.

Professional capabilities required for school and trust business practices

Across the business functions, there were similar trends in how professionals gained the necessary capabilities to secure their MAT roles, with industry standard qualifications and experience gained from previous roles and sectors being the two main routes. Participants described how membership of professional networks, on the job learning and

making the most of networks were the main ways they kept up-to-date and developed in their roles. Performance management, completion of tasks and daily line management were the main ways in which team leaders assessed the capabilities of team members.

Looking to the future, priorities for developing business capabilities were very much led by the needs of the business functions, which, in turn, were very individual to the context of each MAT. The two main needs were to respond to the growth of a MAT and to align more tasks across several functions. This meant that professionals would require training in, for example, how to use a new finance software programme.

Finally, there was a recognition that the level of skills and expertise required of business professionals was increasing and that there were challenges with attracting the right professionals, as well as, developing the skills set of the teams already in place.

Summary

All the participants reported that the direction of travel in their MAT was to align a variety of business practices across their schools. Alignment was being achieved through, the automation of tasks, such as, finance and payroll and, how central and school business teams were being structured around the business functions to implement this greater alignment.

There was a trend to bring the implementation of tasks in-house which was combined with employing business professionals with industry level qualifications and experience, whether that be, for example, in HR, marketing and communications or finance.

According to the participants, these practices implemented added value in several ways such as: efficiencies in time and associated cost savings; effectiveness with facilitating greater consistency and accuracy through the implementation of aligned business tasks and, indirectly supporting pupils' development and learning, by for example, reducing some of the business operation workload of headteachers to allow them to focus on teaching and learning.

Across the functions, there were similar trends in how professionals gained the necessary capabilities to secure their MAT roles including: membership of professional organisations; on the job learning and making the most of formal and informal networks.

Performance management, completion of tasks and daily line management were the main ways in which team leaders assessed the capabilities of team members.

More broadly, despite the similarities in these overarching trends, there was considerable variation in the detail of the implementation of the practices. There was not a 'one size fits all' approach to completing tasks. Variations were evident in, for example, the types

of commercial software programmes used to automate the finance, HR or estate management functions. From the participants' accounts, it was clear that each function was not implemented in isolation. This is not an unexpected observation, but the findings highlight the extent to which there is a need for the integration of practices across functions to maximise the potential of a MAT to meet its strategic and operational aims.

1. Introduction

The last in-depth research into the work of school and trust business professionals³ (STBP) was conducted in 2010 by the National College for Teaching and Leadership (NCTL) and the then Department for Children, Schools and Families (DCSF) when the academy system was in its infancy. Since then, understanding of how the schools and trust business sector has evolved has been based upon quantitative evidence from the 2019, 2021 and 2023 school and trust business professional survey⁴ and the Schools' Workforce Census.⁵ Whilst the STBP survey asks about practice, for example, the use of integrated curriculum and financial planning (ICFP), it does not have the scope to explore school business functions and practices adopted by STBPs, nor which practices make the most difference or add the most value to their schools.

Additionally, findings from sources such as, membership surveys by the ISBL and DfE run informal STBP networks, have highlighted challenges faced by STBPs. Neither provide insight about:

- the practices which make the biggest difference to school business management by senior STBPs
- the requisite capability (skills, knowledge and experience) to achieve the practices
- or how this capability is acquired and maintained

The 2022 Schools White Paper⁶ ambition is that all children will benefit from being taught in a family of schools, with their school in a strong multi-academy trust (MAT), or with plans to join or form one, by 2030. To support the development of strong MATs, it is important to have an in-depth understanding of which MAT business practices make the most difference or add the most value to their schools. The judgement of added value practice to MATs comes from those interviewed and this report showcases these, split into six functional areas. The findings of this research will support the DfE's commitment in the 2022 School Resource Management Strategy⁷ to research good practice and share findings with the sector.

³ The term School and Trust Business Professional (STBP) is used by the Department for Education (DfE) to acknowledge the wide range of practitioners within the profession, from office administrators in small schools, through to business managers in larger secondary schools, to chief financial officers and chief operating officers in multi-academy trusts. This also extends to members of central teams with specialist skills such as human resources or procurement officers.

⁴ Department for Education. (2023). [Survey of school and trust business professionals. Research report.](#)

⁵ Department for Education. (2023). [School workforce in England – 2022.](#) Statistical release.

⁶ HM Government. (2022). [Opportunity for All: strong schools with great teachers for your child.](#)

⁷ Department for Education. (2022). [School Resource Management: Building a stronger system.](#)

1.1 Research aims and objectives

This research, therefore, aimed to better understand:

1. The practices which successful MATs find most effective for managing school resource and adding value, including how they (a) identify the practices, (b) access the business capability, and (c) implement those.
2. How school and trust business professionals with responsibility for finance, procurement, estate management, human resources and marketing and communications gain, develop, demonstrate and maintain capabilities (as manifested by skills, experience and knowledge) in these areas over time.

1.2 Defining school and trust business practices

Throughout this report, several terms are regularly used as part of the findings. Many of the key terms used have been informed by the ISBL Professional Standards.⁸ The standards framework sets out the six main professional disciplines of school business leadership, which are:

- finance
- procurement
- estate management
- human resources (HR)
- marketing and communication
- operational leadership

In the report, these disciplines are described as functions, for example, the procurement function. Each function has a set of tasks that a MAT will carry out as part of that function. For example, conducting a needs analysis, is a procurement task. Finally, the term 'practices' is used to describe the how, or the ways, in which the MATs were carrying out the tasks of a function. For the procurement function, for example, a practice might be the use of a specific software programme to support the submission of tenders.

Additionally, the terms align, or alignment are used in the report to describe where the central team and schools within a MAT have adopted common and/or standardised practices for carrying out some of the tasks of a business function. The terms automate,

⁸ Institute of School Business Leadership. (2023). [Professional Standards](#).

automation or automated are used to describe where a MAT has implemented a shared software programme to support a business function.

1.3 Methodology

A qualitative approach was adopted to explore the business function practices undertaken by trust central and school-based business professionals. This involved in-depth interviews with a range of business professionals on their experiences of practices that added value for their trust and how professionals gain the capability to undertake the functions.

The interviews took place from 15th March to 25th April 2024. They were conducted by telephone or virtually via Microsoft Teams and lasted 45 minutes to one hour. See Appendix 1 for the interview questions.

1.3.1 Interview structure

Due to the need to cover a range of business functions (finance, procurement, estate management, HR, marketing and communications, and operational leadership), with each MAT, several trust and school representatives were interviewed within each MAT. For small MATs,⁹ this could be one to two representatives, two to three for medium sized MATs¹⁰ and three for large MATs¹¹. The allocation of interviews and number of interviews conducted (some including group interviews) varied according to MAT size, structure and areas of responsibility of the business professionals.

To accommodate the variation in team structures, areas of responsibility and MAT size, topic guides were created for small trusts (as one business professional may be responsible for more than one business function) and medium to large trusts (where functions are more likely to be the responsibility of individual business professionals). Participants were asked to consider the six main business functions and practices within these that they felt added value to their trust. A modular approach was therefore taken with the topic guides, so that appropriate functions could be addressed with different MAT representatives.

1.3.2 Interview recruitment and MAT sample

Recruitment and sampling were staged across several phases:

⁹ Defined as MATs comprising of two to nine schools.

¹⁰ Defined as MATs comprising of ten to 19 schools.

¹¹ Defined as MATs comprising of 20 schools or more.

1. The DfE supplied a list of 107 MATs.¹²
2. 60 MATs were selected by the research team based on MAT size and proportionate to the overall MAT population, covering a range of characteristics (plus a reserve list).¹³
3. Initially, DfE invited Chief Financial Officers (CFOs) at 60 MATs to participate by either replying to the invite (to DfE) or directly contacting the research team. Another 47 were invited when the initial invitation was generating insufficient responses, plus 30 more MATs – a mix of small trusts and some MATs comprising only special schools.
4. CGR then conducted scoping calls to any responding MATs to explain the project and why they had been approached, explore the business functions (finance, procurement, estate management, HR, marketing and communications, and operational leadership), that could be discussed, and identify relevant staff who could participate.
5. Scoping call findings were logged to map coverage of the functions, alongside key contact details for potential interviews.

In total, 27 MATs responded to DfE's invite to participate. All 27 were contacted by CGR to arrange interviews and the final interview sample consisted of 24 MATs including:

- 103 business professionals across 73 interview sessions (some individual, some groups)
- Interviews across each function
 - 19 finance
 - 12 procurement
 - 18 estate management
 - 15 HR

¹² The original list of 107 MATs covered: all nine regions, size of trust (reflecting the overall population of MATs); split into different phases of MAT (i.e., mixed, primary academies only, secondary academies only, special academies only); having a positive/reasonable financial health position; at a trust level, above England average on latest Progress 8 scores and the percentage of pupils meeting the expected standard in reading, writing, and mathematics (combined) being greater than 60% (the England average).

¹³ Selection proportionate to MAT size, with mixed phase, single phase, and special MATs within each size band. Within size bands, a range of regions were covered (including some national MATs), plus others where additional school types (other than primary/secondary) might be included and a range of attainment/progress.

- 10 marketing and communication
- 12 operational leadership

The majority of the interview participants were based in trust central teams, five were school based.

The characteristics of the 24 MATs involved are shown in Tables 1, 2 and 3 showing representation in terms of size, type and region.

Table 1: MAT sample by size of MAT

Size (number of academies per MAT)	Count
2	3
3 to 5	3
6 to10	3
11 to 20	7
21+	8
Total	24

Source: MAT interviews

Table 2: MAT sample by phase of MAT

MAT phase	Count
mixed	15
primary	4
secondary	3
special	2
Total	24

Source: MAT interviews

Table 3: MAT sample by region

Region	Count
East Midlands	5
East of England	2
London	2
National	4
North West	3
South West	2
West Midlands	2
Yorkshire and the Humber	4
Total	24

Source: MAT interviews

1.3.3 Data analysis

The interview transcripts were analysed in Nvivo software using a thematic approach for each of the six functions separately, based on the research questions. There were three stages to analysis. Initially, two researchers jointly analysed five interviews from the same MAT to familiarise themselves with the data and to design the first draft of the coding framework. For stage two, both researchers separately analysed interviews from another four MATs. At this point the coding framework was agreed, as the organising themes and the main sub themes for each of the functions had been identified. After coding interviews from half the MATs, the researchers met again to review the framework for the last time and to begin to consider if there were any global themes that went across the functions (stage three).

2. Finance Function

The main finance practices that were reported to add value to the work of a MAT were: aligning finance tasks across a MAT and the implementation of ICFP.

2.1 Aligning finance tasks and teams across a MAT

Aligning many of the tasks that make up the finance function across a MAT was commonly reported as adding value to the work of a trust. This practice was common across all sizes and types of MATs, including small trusts.

The degree to which the various tasks were aligned varied, but it was possible to identify a core of common practices including:

- having one bank account for all schools in a MAT
- using the same financial software, which varied by MAT
- having one invoicing process
- running school and central MAT team monthly management account reports

There was evidence of some variation in the roles and responsibilities between central and school teams in how the practices were implemented. In some instances, the only finance function carried out in the schools was to complete an order on the one invoice system shared by all the schools in a MAT. In this context, there was usually no dedicated finance role in the school and the invoicing task was carried out by a general administrator in a school. All other finance tasks were carried out by the central team. A more common approach was the implementation of a clustering model which was sometimes based on geography and/or school phase. Here, schools were grouped under the management of an experienced and senior business professional and who might be responsible for managing the budgets of schools by, for example:

- inputting of payroll, the inputting of purchase orders and approvals
- overseeing the Purchase Ledger for each school and making sure suppliers are paid on time
- overseeing petty cash (if used)
- Value Added Tax (VAT) returns
- monthly financial forecasting

- ensuring all MAT financial controls and policies are adhered to across schools
- carrying out regular compliance checks
- working with senior teaching leaders in decision making that affects finances and monitoring budget spend
- running and/or taking part in MAT financial networks to share current practice
- supporting the development of any school based financial staff

While the specific roles and responsibilities of the central finance team within a MAT might vary, there were some common tasks, such as:

- managing the internal and external audit activities
- creation of annual financial statements
- preparing financial documentation for the Executive Board and trustees
- running and analysing benchmarking exercises against internal and external data
- writing grant applications
- ICFP analysis

It was not possible to identify the typical length of time it might take to align the various finance tasks, but one participant did describe how it had taken one year, in a medium sized MAT of primary and secondary schools:

When I first started at the MAT, it was only about nine months old and when I came in as an experienced head of finance, I could see that there were loads of issues around finance. There were finances were being run by the individual primary schools and business managers with no real kind of financial experience. Coming from a central point of view, I had no idea how much money we've got. I have no idea what the accounts looked like because I could not understand the information. Within I'd say probably within about six months, we had identified that we wanted to centralise and within 12 months we had done it. – *Medium sized MAT with primary and secondary schools*

The participants described how aligning many of the finance tasks had resulted in several interlinked benefits for their MAT and many of them were common across the interviewee accounts. First, practices such as having one central bank account supported by one

software system, had meant financial savings. These could be savings in auditing fees and in the number of staff needed to implement the finance function:

Our audit fees are just an example. In 2018/19, we paid £36,250, for our audit....because of all of we've done our quote for next year is £35,685. Despite all the inflationary increases over the years we're paying less next year than we did back in 2018/19. And the auditors keep citing the reason they can do that is because they can come to our offices centrally and do the whole of the audit work and get assurances that they don't need to go into the schools for. They don't need to look at multiple bank accounts, they don't need to see what the different office managers are doing. – *Large sized MAT with primary and secondary schools*

Participants in small MATs expressed some initial concerns as to whether the cost of what seemed very expensive financial software might be worth the investment:

And I must admit, I looked at it and I thought, oh, I don't want to spend that much money on a piece of software, but by doing it, we found that we were able to centralise the back office work to the point where we could deploy staff to other areas, so the software kind of paid for itself, but not only that, it also helped us to streamline financial administration. – *Small sized MAT with secondary schools*

Second, aligning finance tasks had been effective in facilitating more consistent practice, accurate reporting and financial forecasting, and therefore more informed financial decision making. It was possible, for example, to get an up-to-date financial account for any school or the MAT as a whole, at any point:

Previously we were having to manually update, we only did 22 uploads a month because it all had to be done by a spreadsheet. We'd have to manually pull a spreadsheet out of our accounting system software, manipulate it, and upload it into the budget software to have the actuals there. Whereas they can now be pulled through daily. I think that's made quite a significant difference to everyone because they don't have to wait. If they posted a journal [record of a financial transaction] they know it will be there the next day, not that they've got to wait for three days until we've done a manual update. – *Medium sized MAT with primary and secondary schools*

Third, participants described that aligning many of the finance tasks contributed to pupils' development and learning in two main ways. It reduced the time senior teaching leaders had to spend on the finance function. For example, headteachers no longer had to spend so much time on tasks, such as, preparing financial documentation for trustees, running

benchmarking exercises against internal and external data, and writing grant applications. In turn, this allowed them more time to focus on teaching and learning. Additionally, some MATs had, for example, not replaced finance roles in schools when a member of staff left or retired. The reduction in staff needed to run the finance function meant those funds could be used elsewhere.

Finally, participants reported that aligned financial systems was a valued approach to risk management. For example, if a member of finance staff in a school were absent, there were other staff in the MAT who could cover that work. In addition, the consistency in reporting reduced the potential for errors in financial reports.

2.2 Integrated curriculum and financial planning analysis

Several of the interview participants who discussed finance function described using ICFP¹⁴ analysis to support their financial business practices. It helped design the best curriculum for their pupils that was affordable, sustainable and aligned with the strategic vision of a school and their MAT. Participants described the ICFP process as following a series of steps which included, for example, reviewing the existing curriculum, staffing structures (including support staff) and overhead and operation costs. Another key element was to include as many stakeholders as possible throughout the process. There was evidence of MATs using different ICFP tools and to varying degrees, but the analyses identified three clear benefits:

- the built-in metrics and the information requested meant it was effective in undertaking what would otherwise be a very complex task
- the process supported informed and collaborative curriculum and financial decision making, with and by professionals from the central team, schools and trustees across a MAT
- it supported pupils' development and learning by putting curriculum requirements at the centre of financial planning

The following vignette provides an account of how one small MAT of all secondary schools implemented ICFP which was typical of other MATs.

¹⁴ ICFP is a management process that helps schools plan the best curriculum for their pupils with the funding they have available. It can be used at any phase or type of school. It involves measuring the current curriculum, staffing structure and finances, and using the data to create a three-to five-year plan.

Implementing integrated curriculum and financial planning analysis

A small sized MAT of all secondary schools, first started to use ICFP as a key strategic approach to come out of a deficit. Initially, the process was led by the Chief Executive Officer (CEO) and the CFO. The CEO began with determining what the curriculum would be like and calculating the number of lessons required for each subject. This was followed by coming to an agreement with headteachers in schools within the MAT, about, for example, the number of teaching hours for headteachers, senior and middle leaders, and class teachers, and how many hours would be allocated for staff with teaching and learning responsibilities (TLRs).

The initial findings from ICFP showed that the schools were overstaffed for the needs of the curriculum and staff teaching timetables were adjusted accordingly. In addition, the MAT has a better understanding of any staff recruitment needs. Both outcomes contributed to financial savings.

However, ICFP is an ongoing process. Over time, and with an increase in pupil numbers, the three-to-five-year financial forecasts and ICFP showed that there was an option to increase the planning, preparation and assessment time (PPA) for teachers. A conscious decision was taken by the MAT to allocate to all teachers, one additional PPA period, to support their planning, which meant staff had above the recommended national guidance set by the Association of School and College Leaders. The MAT took the decision to prioritise teaching and learning whilst knowing that it would remain financially stable in the medium term.

As time has gone on, headteachers have taken greater ownership of ICFP for their schools, in collaboration with the school's finance business partners who are qualified accountants.

Finally, the MAT credited the use of ICFP in helping it to move out of a reserve deficit and a financial notice to improve.

Small sized MAT with secondary schools

3. Procurement Function

The main procurement practices which were reported to add value to the work of a MAT were: aligning procurement practices across a MAT; improving the approach to needs analysis when preparing to procure a new contract; considering the advantages and disadvantages of using in-house and external sources of support for the procurement process; and strategic management of suppliers and contracts.

3.1 Aligning procurement practices across a MAT

Interview participants described several ways in which they were aligning procurement tasks across their MAT. For some this meant having a procurement purchasing policy separate to their finance policy. This was because there was a tendency for procurement to 'get lost' when part of a single policy. Participants reported moving towards having trust wide procurement of contracts, especially for the larger costs such as energy. Some were also finding ways to manage their smaller contracts more effectively, for example agreeing with a supplier to deliver goods directly to schools, rather than the trust central team's location. The creation of a central contract register, and an approved provider list were other common approaches to aligning procurement:

We were a very early adopter of a central contracts register. It is a spreadsheet that incorporates all our contracts by school, by sort of category, contract length and what the notice period would be. If we take on new schools, we bring them in and put them on to that contract register, which then means we can monitor that centrally and then see where there are opportunities to align. – *Small sized MAT with primary schools*

The main benefits of such alignment practices for a MAT were threefold. First, there were financial savings from being able to procure at scale. Second, there were efficiencies in terms of academy leaders and staff not having to spend time on administration in preparation for the execution of a new procurement contract. In turn, participants described how this meant headteachers and senior leaders had more time to focus on education. Finally, central teams had better data from which to make informed strategic decision making around procurement in the longer term.

3.2 Conducting a procurement needs analysis and drafting a specification

Interview participants regularly described their duty and responsibility with procurement to achieve value for money whilst securing the best resources. They reported how conducting a thorough needs analysis and drafting an accurate specification was integral

to effective procurement. Apart from the financial implications, any change in contract, would inevitably lead to some degree of change in an individual school which needed to be planned for and managed well. The needs analysis process typically involved a series of meetings with relevant central and school teams to:

- review the existing contract
- identify if and how requirements might have changed since the procurement of the previous contract
- understand the similarities and differences between the schools in a MAT

They recognised that this might take time, at the start of the procurement process, as, if done thoroughly, it could involve school leaders and other school staff as well as relevant MAT central team members. However, the value of such work was that it increased the chances of procuring a contract that was more likely to meet the needs of the individual schools, as well as the MAT as a whole. Additionally, such approaches facilitated greater collaborative working and understanding across school and MAT teams.

The following case study provides an account of how one procurement lead in a medium sized MAT of primary and secondary schools described their approach to conducting a needs analysis for a new catering contract across their MAT.

Conducting a catering procurement needs analysis

What did the MAT do?

In less than four years the MAT had doubled in size and needed to look more strategically at things like catering. They had five different catering contractors and some in-house provision which was not proving to be an efficient use of resources. However, having one catering contract meant significant change for school teaching and non-teaching leaders, especially those who had in-house catering. Therefore, there was an understanding of the importance of bringing them on a journey and to secure their engagement in the tender process.

How did the MAT implement the practice?

The MAT used an external catering procurement consultant to support the process. The first thing the MAT central team did was to undertake a series of engagement pieces with school teaching leaders and other stakeholders, such as, the school catering teams. They discussed: what was going well in their current catering in their school, what was not going so well and what improvements did they wish to see. The initial meetings were an opportunity to reflect on what would be core for all schools and where was it possible to be flexible. They discussed other issues of importance, including sustainability and core non-negotiables like the price of meals charged to parents.

This was followed by premarket engagement work with possible contractors. The MAT requested, for example, demonstrations with contractors. In addition to food service, they asked specific questions, such as, how the contractor reduced food waste and what they could do in terms of engaging pupils in food and nutrition. They also wanted to know how the contractors would work to promote the individual context of each of their schools.

As part of the needs analysis stage, it was identified that all the contracts ended at different times. This meant that once the contract was awarded, there were some short extensions to existing contracts required to ensure effective implementation. It was also very important to re-engage with school catering teams to explain what was going to happen. Due to close collaboration with all the schools, the new contract was secured within a year, and they managed to successfully transfer all in-house staff over to the new contractor.

What was the value of the practices for the MAT?

There were a number of benefits to moving to one catering supplier across all the schools in the MAT. First, it meant managing one supplier rather than five. Value for money was achieved through the use of a catering procurement specialist who had an up-to-date understanding of the current market and expertise to navigate the tender process, including the electronic system required to advertise the tender and for tender

submissions to be made. Second, there were efficiencies with time as the supplier had allocated a dedicated catering manager for the MAT who could be contacted to manage all queries. Third, there were improved teaching and learning opportunities for all pupils across the schools due to the built-in curriculum activities on nutrition and food sustainability.

Medium sized MAT with primary and secondary schools

Writing the specification for a contract to go to procurement was described as a very technical process. Therefore, several participants reported employing external consultants at this point to complete the relevant documentation. The benefits of such a practice for a MAT were that a consultant had the expertise to write a more accurate specification. This in turn, reduced the likelihood of errors in a specification and therefore reduced the risks financially, operationally and strategically for a MAT. Without the right level of expertise and experience in the procurement field, writing a specification could take time and using a consultant reduced the workload for central teams. Finally, the cost of a consultant was outweighed by ensuring a better value for money contract overall.

3.3 Procurement routes to market – in-house and external consultants

Participants expressed different experiences and views about whether to use external consultants to support the process of going to market to procure a supplier. This included whether using a framework or going out to tender was the most appropriate procurement route.

In many respects the availability and expertise of procurement staff in a central team and the size of the contract could influence the processes adopted. For very large contracts, such as energy and catering, MATs would typically go to tender with the support of an external consultant. This was described as sometimes very costly, but often worth the risk for the same reasons previously described such as: the time saved on the part of the central team; maximising the chance of securing a very cost effective contract; and reducing the risk of making errors in terms of regulations and compliance which could result in costly penalties. For medium sized contracts, some participants described the benefits of using published frameworks¹⁵ such as the DfE Buying for schools framework¹⁶ as this could be quicker, prior vetting of the companies had been undertaken and there was less reliance on the services and costs of a consultant. However, unless able to access a dynamic procurement system, MATs could only

¹⁵ Framework agreements help schools to buy goods and services from a list of pre-approved suppliers, with agreed terms and conditions and legal protections.

¹⁶ Department for Education. (2023). [Buying for schools: finding an approved framework agreement](#).

commission the providers on the framework, and they knew of other potentially strong providers they wanted to approach, who were not on the framework.

The vignette below presents one participant's description of how they began managing the tender process from specification to evaluation without the support of a consultant for the first time, by using a commercially available software package.

Writing a procurement tender in-house

The MAT team wanted to look at procuring architectural services to support the estates team and to undertake the whole process in-house. They used a procurement software package that is commercially available. The software package provided all the necessary documentation, such as letter and legal templates, where and how to advertise and provided telephone support for technical queries. The team could complete the whole process through the portal, including hosting on a live public facing tender website. Initially, there were 93 companies who showed an interest in making a bid and 20 finally submitted.

The participant described that the whole process had taken more time than they had anticipated. However, the value of the package was that it provided the guidance needed for a MAT team without the necessary expertise. The learning process was valuable in that it had provided them with the confidence to repeat the exercise again for small to medium sized tenders and this saved on consultancy fees.

Large sized MAT with primary and secondary schools

3.4 Working strategically with suppliers and contract managing

Many of the interview participants responsible for procurement described how there was a need for a more strategic approach to working with suppliers and managing contracts. The most common practices adopted to work more strategically with suppliers were:

- reducing the number of suppliers on their approved supplier list
- building stronger relationships with suppliers
- establishing processes to manage contracts

Participants with experience from other sectors reported that when they first started with a MAT, it was typical to find sometimes thousands of suppliers on the MAT's list of approved suppliers. They described how this was different to practice in their previous organisations where supplier lists were shorter. This included organisations that were

much larger and with bigger budgets. Therefore, participants described a process of reducing the number of approved suppliers which typically included an exercise of extracting and analysing relevant financial data from their accounting system, identifying, for example, who the suppliers were, how many transactions were undertaken with each supplier, which schools in the MAT were using them, and which points of the year the contracts were agreed.

The value for a MAT of reducing the approved supplier list was in the resulting overview of which suppliers offered the best value, whether they were used regularly across the year or for very large contracts. This analysis was then used to decide which contractors to remove from the list, which in turn meant time saved for school and central teams when looking for suppliers which offered the best value for money.

Another reason to reduce the supplier list was to be able to identify who were a MAT's key suppliers. This meant that the relevant person in the central team could target who best to focus on with relationship building. One participant described the appointment of a contracts manager to oversee this work. The value of this practice was twofold. First, if any difficulties arose during the period of a contract, having a known contact in the supplier could help to ensure a quicker resolution. Second, an ongoing dialogue with a supplier about future developments in the supplier sector and how these might align with the future priorities of the MAT, helped to keep a MAT updated.

Finally, interview participants described the challenge of keeping on top of contract finishing and ending timetables. Having automated procurement processes, for example, meant that a central MAT team could factor in advance notice of contracts ending to allow sufficient time for retendering a contract if required. Automated reminders were also used to prevent any costly automatic subscription renewals. This was particularly the case for resources that required annual licenses. One participant described how, to support this process, an Information Assurance Board was established that meets twice a month to review software requests. Each proposal is reviewed in terms of, for example, its terms and conditions of the contract and General Data Protection Regulation (GDPR) compliance. In addition, the Board closely monitors when subscriptions are due for renewal to prevent them for auto renewing without a review. These processes were reported as adding value in terms of considering the cost as well as the educational benefits of subscription and with ensuring that relevant practices were compliant.

4. Human Resources Function

The main HR practices, reported by interview participants, that had added value to the work of a MAT were: aligning the structure of HR central and school teams across a MAT; integrating the HR and payroll systems; and the introduction of coaching as an approach to professional development.

4.1 Aligning the structure of HR central and school teams

There were three main ways in which HR teams were structured across a MAT: models based on the use of external HR consultants; models where all HR tasks were carried out by a central team; and models where the HR function was implemented through a 'hub and spoke' approach.

Several participants spoke of using external HR consultants to support the HR function across their MAT. Typically, consultants would be employed to undertake all or some of the following:

- provide high level legal advice on employment law
- seek advice from when managing difficult case work
- guidance with ensuring all policies, procedures and practices are compliant with HR related legislation and guidance
- provide standard letter templates

One of the primary benefits of such an approach was in its cost effectiveness as described by one participant:

We don't employ a HR director. We buy the service level agreement through a company which costs us £30,000 a year. I could not employ a HR director for £30,000. On top, you have got all the pension costs, maternity/paternity and staff sickness costs. Our service level agreement is with a HR company, if someone is off sick, they will have another person to cover... for us, that is a far more cost effective way of doing it.
– *Medium sized MAT with primary and secondary schools*

Some of the larger MATs reported moving all HR functions completely in-house to their central team. This often required the appointment of an appropriate and highly qualified HR specialist in the role of HR Director or Director of People. Typically, MATs of medium to large size, along with the appointment of a specialist, developed a 'hub and spoke' HR operating model. Here HR specialists would oversee a cluster of schools and would be

the first line of support to schools with, for example, advice on employee relations cases and support with any recruitment strategy. In some cases, in this model, schools, especially secondary schools, had their own HR member of staff. MATs in this group described the value of such practices as having ready access to expertise by people who knew the staff well and were committed to the work of the MAT. It also allowed for more consistent practices across settings and greater opportunities to plan strategically.

Finally, a small number of MATs were still using the support of external consultants but had brought the recruitment task in-house. They described the rationale for this approach as ensuring more consistent and safer recruitment practices.

4.2 Integrating payroll and HR systems

To improve the management of the HR function some MATs had recently started to integrate the HR and payroll systems across their MAT. This required the implementation of an automated service which could offer multiple facilities, such as:

- all payroll submitted into the one system
- onboarding processes for all new staff
- the submission of time sheet
- a hub for new staff to understand the structure of the academy (subject to GDPR)
- the submission of all Professional Development Records (PDR)
- the submission of attendance data
- poll surveys for staff
- HR templates

In most instances, data were inputted at the academy level and the central team would focus on quality assurance and the analysis of the data it could provide.

The participants reported three overarching benefits and advantages of integrating the payroll and HR systems. First, it was reported as a more cost effective approach, by, for example, procuring (and the associated costs) and paying for one software licence. Second, the fact that all relevant data is in one place allowed for quicker and more robust quality assurance checks and therefore increases the likelihood of more accurate salary and pension payments.

Third, there were several time efficiency benefits which have subsequent benefits for other MAT functions. It was quicker to run various reports, such as staff absence, to facilitate more timely and proactive supportive measures for staff. It allowed for quicker analyses of recruitment and retention trends to then inform short- and long-term strategic work force planning. One MAT had just completed a piece of work to look at the promotion rates of groups of staff from different ethnicities and by gender in a way that had not been possible before integration. The results were being used to support the MAT's ambition to be a more diverse organisation. The following vignette describes how another MAT was using the data to identify trends in relation to the annual return on the gender pay gap.

Using integrated payroll and HR systems to identify gender pay gaps

One MAT reported that before the implementation of an integrated payroll and HR system, gathering the data needed to complete the analyses for the annual gender pay gap return was challenging and time consuming. They described the integration payroll and HR as transformational for these types of tasks. They were able to complete their annual gender pay gap return, but, when coupled with a data visualisation app, they could also analyse by school, teaching category and any other relevant variable. This provided a more in depth understanding of the subject.

Medium sized MAT with primary and secondary schools

Finally, those MATs who had access to an onboarding function reported that it as a more efficient and positive experience for new staff to complete all the necessary paperwork. This too was seen as making some small contribution to a wider retention and recruitment strategy as prospective staff would feel more invested in.

4.3 Coaching approaches to performance management and professional development

Some participants described having introduced coaching approaches to support staff development. The extent to which it was adopted and how it was being implemented varied. In some settings, coaching was just available for senior leaders and was optional; in others it was an integral element of the leadership development programme. The following case study shows how one MAT had introduced coaching as their approach to performance management for all staff.

Piloting a coaching performance management model

What did the MAT do?

The MAT had piloted decoupling the performance management process from pay and introduced a coaching model for all teaching and non-teaching staff. The model placed an emphasis on a bespoke process that was driven more by the employee than the line manager who was seen as representing the needs of the organisation. It focused on developing the individual member of staff, according to their needs and for their current and future roles.

How did the MAT implement the practice?

The MAT has started the pilot in three of their schools. It was led by the central HR team but implemented throughout the MAT in collaboration with the support and expertise of colleagues in their continuing professional development (CPD) hubs and the teaching school. The pilot began with training in coaching techniques for senior staff in the central team and the schools. This included the rationale for introducing the pilot and how to set goals in coaching sessions with teaching and non-teaching colleagues. It was followed up with further training for all staff who would have a coaching role. A development framework was devised to capture all elements of the coaching model and reviewed with union representatives before implementation.

What was the value of the practice for the MAT?

At the time of the research interview, the pilot was half way through its first year, but early feedback showed that the new approach had been well received by all those involved. One participant described how the staff increasingly reported how they felt that the organisation was genuinely interested in them, as an individual, and just not what was of relevance to the organisation. This was in keeping with what the MAT hoped the model would do, which was to see an increase in staff retention rates if staff felt more valued by the organisation. In turn, this would support more effective success planning.

Medium sized MAT with primary and secondary schools

5. Estate Management Function

The main estate management practices which were reported to add value to the work of a MAT were: aligning the structure of central and school estate teams across a MAT; automating estate management tasks; developing project management approaches and implementing sustainable practices.

5.1 Aligning the structure of central and school estate teams

The findings showed that although there was a trend towards aligning estate management tasks, how estate teams were structured to deliver that function varied. For example, in one medium sized MAT with primary and secondary schools, there was an estate management lead in the central team and a premises manager on each site. The premises manager was directly line managed by the headteacher, but the central lead met every six weeks with the managers in a meeting and every three to four weeks on a one-to-one basis for an informal catch up on estate management issues that were current for each of the premises managers in their settings. The meeting was split between standing items, such as health and safety and compliance issues that the premises managers wanted to discuss. The premises managers were responsible for a writing a monthly report which included, for example, all preventative and remedial work that had happened on site and an update on the number and response rates to tickets on the estate management service desk. The benefits of this team structure were: the need for smaller central estate teams; expertise was spread across a MAT; and through regular collaboration, expertise was continually developed.

In another example, a larger sized MAT with primary and secondary schools had a bigger central team that consisted of a building surveyor, a fully qualified electrician and health and safety professional. The staff in the schools were maintenance officers whose responsibilities included opening and closing the buildings and assisting with access for construction workers on site. The reported value of such a structure was that many of the technical, but regular, estate maintenance tasks, such as building condition surveys, electrical and water testing, could all remain in-house with associated financial savings. There were also benefits for capital projects, the electrician, for example, had been able to lead on the LED light programme. Additionally, when contributing to the writing of and evaluation of relevant procurement specifications, there was expertise in the team that could better inform the process. Finally, there was a recognition generally by interview participants that having such expertise in a central team brought value by releasing senior leaders in schools from operational estate focused work:

You can't remove school level responsibility. Heads need to be responsible and accountable for the safety of their school. But do they need to be writing all the risk assessments today? Do they need to be liaising with the contractors, bringing the contractors in or making sure the contractors are compliant today? Do they need to be undertaking site inspections? No, they don't. – *Small sized MAT with primary schools*

5.2 Automating estate management tasks

Evidence of automating some of the estate management functions was seen in a small number of MATs and for other participants, it was a priority for future development. The different software packages used typically looked to schedule, monitor and report on a variety of activities:

We have got a cloud-based system whereby actually we can record all the statutory inspections and when they're undertaken, we can record all the checks that are undertaken by the caretakers. We can record any reactive or planned maintenance work any accidents or incidents linked to or near misses. All those are captured within this system. The system is set at school level, but with an overarching trust view. We can move that system one stage further. We haven't yet, but it can also include condition of buildings and help kind of plan future project work. – *Small sized MAT with primary schools*

According to interview participants, using such software meant that the central team had a very good understanding of the condition of the estate. In turn, this ensured higher levels of health and safety by, for example, being able to monitor and ensure up-to-date health and safety and compliance checklists. Some programmes had the facility to upload photographs which might be a maintenance problem or a red sticker showing that an electrical test on a piece of equipment had been undertaken. The programmes can help to facilitate a continued focus on preventative as well as responsive maintenance which had implications for cost savings. By recording response times to ticketed jobs, it had been possible to link this with MAT key performance indicators (KPI), supporting a MAT in its strategic aims. As with the introduction of financial software programmes, there was a training and adjustment period, but this was far outweighed by the benefits:

You know we have signed up to five years on using this portal, but it's the best money that we will spend because you cannot mess around with property compliance safety – *Medium sized MAT with primary and secondary schools*

5.3 Developing project management expertise to manage capital projects

Managing capital projects is one of the key tasks of the estate management function. To illustrate, one large sized MAT with primary and secondary schools, had recently completed a build amalgamating two schools onto one site in 11 months under the direction of the Estates Manager. Such projects require strong project management expertise to execute successfully and to prevent delays that can have financial penalties and cause disruption to learning and teaching. Some of the participants described the different frameworks they used to support project management, such as, templates from the Construction Plant-Hire Association. There was evidence of an emerging trend of some central team members gaining industry standard qualifications in project management methodology. There were many benefits to having staff with such expertise in central teams. Participants described how it was effective in supporting an informed and consistent approach across all projects and therefore, prevented any costly delays due to poor project planning. Second, it supported collaboration across a MAT on a project, due to the process of engaging stakeholders at key points, such as, at the project initiation stage.

5.4 Sustainable estate management practices

A few of the interview participants made brief references to the importance of considering sustainability as part of their estates work. It was, for example, a standing item on the agenda for premises team meetings to ensure it was part of a MAT's continuous improvement cycle. Installing LED lights, solar panels, air and ground source heat pumps were frequently reported as part of ongoing updating of the school estates. The following case study presents the work of a small MAT with primary schools in implementing a MAT wide approach to sustainability.

A MAT wide approach to sustainable estate management practices

What did the MAT do?

Led by a working group (meeting every half term) comprising staff from the central team, premises and education, some examples of the sustainable practices carried out since 2022 included: an initial audit of the buildings to check for the number of electrical appliances routinely left on/on standby; solar panels on some of the schools; a zoned central heating system in one school; LED lights throughout the MAT; a food waste recycling system in all schools; replacing laminating learning materials with switching to using plastic wallets; bug houses around school buildings; bat friendly roofs on all the buildings and access for bats into the roof space.

How did the MAT implement the practices?

Such practices were achieved through support at the executive level including: having climate change as one of the eight key strategic projects for the MAT; one of the trustees acting as a champion for sustainable practices and the working group reports to the Resources Committee every term. The climate action plan is shared with all heads and is a standing agenda item at the business managers meeting. The estates director worked closely with the school maintenance officers to change mindsets to review practice. To keep themselves informed, staff in and beyond the working group have signed up for eco courses available from The National College.

What was the value of the practices for the MAT?

The results of the initial audit saw a reduction of 150 items left on standby overnight brought down to five. These behaviour changes and the solar panels have been effective in reducing the MAT's reported carbon footprint and there has been a big reduction in the MAT's electricity costs. The food recycling scheme has entailed a small cost, but the value has been to the curriculum and children's learning and environmental understanding. Finally, the working group has been a welcome opportunity for professionals from the central team and teachers and support assistants to collaborate on a project.

Small sized MAT with primary schools

6. Marketing and Communications Function

There was a wide variation in the marketing and communications capacity and levels of individual expertise within central MAT teams and individual schools. Consequently, it was, in many ways, the least developed of the functions. Nevertheless, there were some emerging common trends related to aligning practices and some examples of innovative practice, including the appointment of a Talent Manager.

6.1 Aligning marketing and communications structures and processes

For the most part, due to financial constraints or not being able to recruit a suitably qualified professional, many of the participants reported outsourcing support for the marketing and communications function. However, this did not always mean working at a distance from agency staff, as described by one participant:

We have an agency that work with us, but they have a team of two who are very much our dedicated account managers and they sit in our office two or three days a week. They are responsible not only for helping us with strategy, but all the delivery of it. They do all the branding for us, and they have created and keep a central branding repository, for example, logos and templates, here on our shared space. We did quite a long selection process for recruiting. We wanted them to understand our voice and to be able to communicate authentically for the trust and for it to not just feel like corporate spin. – *Large sized MAT with primary and secondary schools*

There was some evidence of MATs creating small teams or positions to support an in-house approach to marketing and communications. A very large MAT, with two marketing managers in the central team offered a consultancy type service for their schools when requested. The type of support they offered included, for example, advice with the development of action plans to support pupil and staff recruitment and helping with development of new websites. The value of such an approach for the schools was primarily cost efficiency, as it gave many schools access to marketing and communications advice that they ordinarily would not be able to afford.

Approaches to branding ranged from having a clear policy that entailed a very visible and standardised approach to, for example, school websites, promotional materials and internal materials, to MATs where, due to resource constraints or because of a strategic decision, branding was not a common focus for practice.

An example of a MAT that had focused on developing its brand and reputation was a relatively small sized MAT of primary schools. The MAT had employed a lead person for marketing and communications who had been in role for over five years and during that time, with support from external specialists (videographers and web developers), the MAT had been able to undertake two major tasks. The first involved the creation of videos for each of the schools with an aim of enhancing staff recruitment. The videos captured staff voices (teaching and support staff) about why people liked working at the academy and what made it different to other employers. These videos were then shared across several social media channels and on the vacancies page of each website. Second, the MAT had embarked on a process of website standardisation across all the schools. The aim was for the websites to have a very similar look and feel. In preparation for the final design, the lead spent some time investigating the different approaches such as adopting a child friendly or more corporate design. These were then reviewed with headteachers. The task was complicated by the fact that all the schools used different website platforms and hence the need for an external web building team. An ongoing role for the lead was ensuring that the websites were compliant with GDPR legislation.

For other MATs, whether through a lack of resources or a deliberate strategic decision, there was less emphasis of visible branding. In other instances, such as that in the following vignette from a medium size MAT, branding practices implemented were determined by strategic priorities such as the need to increase pupil numbers.

Creating a MAT brand

The process of creating a brand by the MAT's media and marketing manager began with visiting schools in the MAT and listening to colleagues to identify what they felt were their unique selling points, particularly from a parent perspective. The manager then worked with each academy to create websites and prospectuses that were easy to navigate. This included reducing a forty-page prospectus to a two-sided accessible document that busy parents might have time, and be enticed, to read. With a background in design, the manager was able to support with individual website designs that struck a balance between celebrating the uniqueness and individuality of each school whilst maintaining the trust brand. The focus for brand development at this early stage was to celebrate what the schools did well, for school websites to look professional and to have a level of standardisation evident across the websites. The value of such a role for the MAT included benefiting from the advice, of a qualified and experienced professional, who was committed to the MAT and who knew it well. This gave senior leaders and staff more time to focus on more immediate priorities such as teaching and learning.

Medium sized MAT of primary schools

6.2 Marketing and maintaining a MAT talent pool

The HR and marketing and communications functions both include tasks relating to recruitment and retention of staff and pupils. Additionally, all of the communications and marketing professionals interviewed, described how much of their current work was directed towards ways of promoting staff recruitment and retention, in collaboration with their HR colleagues, which is evident in this section.

We took on a Grade 4, Requires Improvement, school as a sponsored academy and we filled 43 vacancies without spending a pound on an advert. This is through marketing and through the talent pool. – *Medium sized MAT with primary and secondary schools*

The above quotation was from a participant responsible for the talent strategy of a medium sized MAT with primary and secondary schools. The MAT was committed to ensuring that the best possible teachers were in front of pupils. They described this as giving pupils the best possible chance to succeed. However, this was recognised as a challenge, due to national and local demands of the teacher and support staff employment sector. The approach taken was a persistent and comprehensive focus on attracting and recruiting people to the talent pool through:

- understanding that professionals needed to feel a sense of belonging and finding ways to promote that in their schools
- implementing a number of diversity programmes to improve related practice in their schools, to attract professionals from a variety of backgrounds
- ensuring opportunities for career progression within the MAT
- numerous informal professional and personal opportunities for staff and others in the community to connect with the MAT, such as, 'Chai and chat' events on an evening in the local town, 'leadership suppers' where teachers can meet with MAT leaders, 'Mat and Pat' maternity and paternity events in the community
- using social platforms for positive stories related to the MAT, rather than for job advertisements
- meeting people straight away for a 'coffee at speed' if they have expressed an interest in working for the MAT, even if there are no current vacancies
- letting people know on the day of an interview if they have been successful or not
- offering job interviews during out of school hours

- asking MAT staff to refer people they know who might have moved into the area
- maintaining regular contact with trainee teachers appointed for posts in January to begin in September.

7. Operational Leadership

Unlike the specialist business functions described thus far, operational leadership is concerned with leading operational planning across all the functions, to ensure effective and sustainable resource allocation to maximise outcomes for pupils. The four main tasks are: managing people and stakeholders; governance and accountability; managing risk; and innovation and change management. In practice these tasks can overlap with tasks from other functions. The operational leadership function is the responsibility of the MAT professional who has oversight of operations. COOs participated in the interviews. Often these participants reported on specialist business functions but specific to operational leadership they described practices relating to managing risk and community engagement innovation initiatives that had added value to their work.

7.1 Managing risk

Managing risk across a MAT, and across the functions was described as a key operational leadership task. Maintaining an up-to-date Risk Register was essential in effectively achieving this task. To support this task, as with the other functions, some MATs had started to use commercial software to support the process. Such software enabled one place for risks and risk judgments to be recorded, and combined with progress against the current compliance timetable. The value of automating the Register to a MAT was that it could offer efficiencies with time, including with compiling relevant reports for trustees and external scrutiny.

That said, interview participants described how the quality of discussions that went alongside the use of the software was of equal value. Examples of discussions with trustees included appetite for risk and tolerance for risk, around for example, finance, people and buildings. The use of a software programme allowed more time for these key discussions.

At an operational level, it was common for relevant leads to build in health and safety audits into their quality assurance cycle. These were typically overseen by a central team professional but in collaboration with relevant school staff, including each school's premises team member. One participant described how their health and safety audits, had over time, developed into peer led audits carried out by the operations managers across the MAT. Once a month all the operations managers go into one school and carry out a detailed health and safety audit. Such practices had the value of enabling more collaborative working of professionals across a MAT to share expertise and take away new ideas to implement in their own settings.

7.2 Community engagement

As part of their commitment to innovation and change, the following case study presents a summary of one MAT's community engagement provision. They described how their work was influenced by 'think pieces' from the Confederation of School Trusts (CST) on leadership and how MATs could be an anchor institution in their local community.

Engagement with the community

What did the MAT do?

One MAT demonstrated its civic responsibility through three projects. The first was the running of two existing community libraries, with a local community charitable trust, on a cost recovered basis. The MAT manages negotiating the leases and has a service level agreement with the local authority for the provision of a public lending service. The local trust is responsible for the day to day running and staffing of the libraries.

The second project was the provision of a food bank called the Community Fridge which is based in one of the libraries. The emphasis of the work is on reducing wastage and becoming environmentally sustainable. Daily, the pupils will go to the local supermarkets to collect food, which is safe to eat, but is surplus and/or in danger of not being sold. The food is then placed in the library for the public to come in and take home without any charge.

The third project was the creation of a partnership of major employers (many of them national employers) in the area, with the MAT in the chairing role, and acting as the anchor institution. The employers in the partnership agreed to pool the funds they usually individually set aside for community projects, into one joint fund. In addition to organising and chairing the partnership, the MAT supports local charities and community organisations who may wish to apply for funding for their work. In addition, the partnership has recently launched a public facing website with details of their work and how, for example, local charities can apply for funding. This initiative was managed by the MAT and sponsored by one of the employers in the partnership.

How did the MAT implement the practices?

The MAT had made a strategic decision to commit to engaging with the community by functioning as an anchor institution. The work had the full support of the executive board. Additionally, much of the work was carried out by a business professional whose main responsibility is community engagement.

What was the value of the practices to the MAT?

Apart from fulfilling their civic responsibility, the key value of the practices for the MAT is in their contribution to pupil learning and development. For example, one of the MAT's Job Coaches is placed in one of the two forementioned community libraries to work with six pupils (rotated) from their schools. The Job Coach facilitates work related learning experiences, including supporting the pupils to deliver books to people in the community. In running the Community Fridge, the pupils are learning to understand how to build professional relationships and retail practices such as picking up supplies and stocking shelves. The employers in the organisation value the newly established employer partnership as they are able to evidence how the sums of money they allocate for social responsibility are directly impacting on a need in the area. For the MAT, the value is in being an anchor institution in the community and developing its relationships with small and large employers which will have benefits for their pupils in terms of work experience and/or employment after leaving school.

Small sized MAT with special schools

8. Professional capabilities required for school and trust business practices

The following section presents the findings to the second research aim describing how school and trust business professionals gain, develop, demonstrate, and maintain capabilities (as manifested by skills, experience and knowledge) in the business functions over time.

8.1 How professionals gain the capabilities to carry out their roles

Participants reported two main ways in which professionals initially gained the professional capabilities to carry out their roles and responsibilities. First, through experience gained, primarily from previous roles in other sectors before joining a MAT, and second, through qualifications achieved. This was consistent across the main roles and all the functions. Very few of the interview participants had previously worked in MATs and/or schools.

8.1.1 Experience gained from previous roles in other sectors

Most of the interview participants, in whatever role and function, had previously worked in a variety of sectors including the:

- public sector, such as, local government, higher education, health and the police, and regulatory bodies
- private sector, such as, banking, accountancy, private businesses
- charities
- journalism

They usually came with many years (often ten years and more) of experience and described how very relevant and transferable the knowledge, skills and experiences were from these other sectors. Most of the COO and CFO and other business professionals in finance roles had primarily worked in the banking sector, local authority finance departments, accountancy firms and charities. Additionally, participants reported that experience from a previous sector had been beneficial:

I spent a number of years in the private sector working for [name of bank]. I was a team leader in that particular role so I have covered different aspects within the organisation and I have learned different skills along the way that allow me to adjust to the individuals that I'm working with at the time. – *Small sized MAT with secondary schools*

Some participants, for example, had held senior roles in very large organisations, managing very large budgets and procurement contracts.

Many of the participants who held estate management roles had previously primarily worked in the public sector, such as local government, health, higher education, regulatory bodies and the police force. This was often in some form of estate/facilities management role and generally managing larger estates. Other participants had trained in construction including, for example, as an electrician and in building surveying, allowing them to carry out specialist building tasks within a MAT.

Similarly, participants in HR roles had worked, often for many years, in the public and/or private sector, as described by one participant:

I was the head of HR for a university's clinical school, so working in academia but also with links to the NHS...Then I went into hospitality [in the private sector]. – *Medium sized MAT with primary and secondary schools*

One of the participants working in an academy in a marketing and communications role described their route through journalism and having held marketing roles in the private sector.

Finally, a minority of the participants did come with experience gained from working within the school and academy sector. Some of them had worked their way up to senior and/or central role teams within the same MAT. These professionals often reported the advantage of not needing, for example, the time to familiarise themselves with how the education sector operates. Two of the participants reported having worked for other MATs in similar roles. In addition, some MATs were offering apprenticeship routes into finance roles and another into a marketing and communications and role:

I started when I was 19 [over five years ago]. I was an apprentice to begin with. I was doing a digital marketing course at a local college and I worked at the MAT doing the website administration. My role just sort of progressed and once I'd got that qualification this coordinator role came up. – *Medium sized MAT with primary schools*

8.1.2 Qualifications

The participants were well qualified in their respective fields, and many held, across the key MAT functions, industry standard qualifications. Those participants, for example, in COO, CFO and other finance roles, held degrees in finance, formal accountancy qualifications, banking qualifications and postgraduate qualifications in management. One held a master's in business administration (MBA). One professional had a postgraduate qualification in procurement. Professionals in estate roles primarily held certificates, diplomas or degrees in business and/or construction, as well as National Examination Board for Occupational Safety and Health (NEBOSH) qualifications. One was a qualified architect. Participants in HR roles were usually qualified at various levels and registered with the CIPD. There was less evidence for those participants in marketing and communication roles having taken a common qualifications route, with one having qualified as a journalist, another gaining a graphics design degree and another having taken a digital marketing qualification.

Participants reported how these qualifications they had gained at the start, and often throughout their careers to date, had provided them with the knowledge, skills and expertise to carry out their MAT roles and responsibilities as described by the MAT lead for estate management:

My background is an engineer by trade. I'm a toolmaker. Then I got into IT and I have professional qualifications in IT, I am Microsoft Cisco certified. Then I started to get into project management. – *Medium sized MAT with primary and secondary schools*

8.2 Developing capabilities when in role

When in role, the participants were taking part in a variety of activities to continue to develop their knowledge, skills and expertise. The most reported ways were: benefiting from being a member of professional body; on the job learning; networking within and outside the MAT; through formal and informal coaching and mentoring opportunities; and training.

8.2.1 Membership of a professional body

One of the most reported ways in which participants continued to maintain and develop their capabilities in their role was through membership of one or more professional bodies or associations. Many of the participants, across all the functions, reported the wide-ranging benefits of being a member of the Confederation of School Trusts (CST). One participant explained that:

We are members of the Confederation of School Trusts and we get a lot from them. It provides a really useful community, but they also issue lots of information and advice and do workshops and seminars. – *Large sized MAT with primary and secondary schools*

Other, education related professional associations reported by a few participants were the National Governance Association (NGA) and ISBL. Once again, they reported being kept up-to-date through briefings, websites and webinars.

In addition, to education related professional bodies, many participants were members of a professional body related to their role, and training by qualification including, for example, the:

- Association of Chartered Certified Accountants
- Chartered Management Institute
- Chartered Institute of Procurement and Supply
- Chartered Institute of Personnel and Development

The benefit of this type of membership was in keeping up-to-date with the latest developments in their respective professions.

8.2.2 On the job learning

Learning whilst carrying out the role was another important way in which participants reported maintaining and developing their professional capabilities.

This was achieved in in two main ways. First, through working with and learning from more experienced colleagues whilst carrying out ‘every day’ duties. Participants described how line managers and colleagues were always on hand to ask questions, especially when undertaking more complex tasks for the first time, such as, running monthly financial reports. Taking part in meetings was another opportunity to learn what was required of a role.

Second, the regular interactions that took place with various external and specialist consultants as part of their practice, provided another opportunity for on the job learning. Participants described how working alongside other professionals, such as, auditors, architects, health and safety inspectors, procurement specialists and HR consultants, to name a few, was very beneficial for their ongoing professional development. For example, when accompanying an external health and safety inspector on a compliance inspection, a premises manager could learn more about how to maintain safe working areas. External audit partners were another commonly reported source of support, with,

for example, helping finance professionals to understand how to present accounts that met financial regulations. Participants reported how these professionals often helped in filling any gaps in their knowledge and skills, keeping them up-to-date with industry standards and exposed them to different ways of thinking, especially if it was not an area in which they were qualified.

8.2.3 Making the most of networks

Participants described the many networks they were a member of that helped them to maintain and develop their professional capabilities. It was reported that several MATs run a variety of internal hubs including those relevant for central teams:

There are hubs for all different aspects of subjects and the business side of things within MAT. And in terms of collaboration, I just think that's a massive, massive strength of the Trust and one of the best ways of communicating with members of staff in the Trust as well. It's just a great opportunity for people to come together regularly to share that best practice. – *Medium sized MAT with primary and secondary schools*

Others held less formal networks, such as a SBM network consisting of professionals from central and school teams. Such networks provided opportunities to share practice, expertise and seek advice from colleagues. This was seen as particularly important due to the wide brief of the SBM role and that it was not always possible to be an expert in all aspect of the role. Moreover, for some it could feel an isolated role and the support from a network was a welcome. Some participants also described how the use of WhatsApp could complement the work of a network.

External networks were another way to learn from colleagues and to keep up-to-date. These could be more informal networks set up by a small group of MATs, such as one for estate management leads and finance, described by two participants:

It's like I am part of a little network that has three MATs....with the other peoplewho are doing sort of the same as I do.... we just went to a conference a few weeks ago on mostly premises and estates...so that was very good. – *Large sized MAT with primary and secondary schools*

In the locality, we have got other MATs which are a similar size to us. I have worked with them from a finance point of view, so it's kind of using what you need at a given moment and being open to when you can support others... I'm very happy to help out with the idea that at some point I might need to come back and say, well, what do you do about this or how do you approach that? – *Large sized MAT with primary and secondary schools*

Some participants described how helpful it had been to visit MATs that were of a similar size to get new ideas, or if they were looking to procure a new, large contract:

So say we've procured a HR system, for example. We went to visit somebody that already used it, but as part of that visit we've got what we wanted to out of that. But it always happens. They start asking you about other things that you do, so before you know it, you're sharing information and practice about other things as well.– *Medium sized MAT with primary schools*

Finally, some participants described how their local Schools Forum, was an important way to keep up-to-date with developments in strategic and operational priorities for schools, such as future trends in pupil numbers in the local area. It was an opportunity to hear of business practices in other settings and establish informal links with colleagues from other schools, not in their MAT.

8.2.4 Coaching

Interview participants described the benefits of any coaching and/or mentoring they had received, especially when they had first started in role:

So, I was given an external mentor [organised by the CEO] which was invaluable. That was a Chief Finance Officer who had been in post for many years in [name of county]. I could meet with them whenever I wanted to. That was brilliant. – *Large sized MAT with primary and secondary schools*

Others continue to have coaching regularly as part of their ongoing development or it is offered as and when it is required by a professional. This was an important source of support, especially during more challenging situations, such as during rapid periods of MAT expansion. For others, it was a chance to reflect on how they might improve their practice and business practices more broadly across a MAT.

8.2.5 Training and other learning opportunities

Finally, participants reported attending conferences, webinars and other training opportunities. Such opportunities included in-house training programmes, on subjects such as leadership. Other participants described how their MATs supported colleagues to gain formal qualifications:

I've got one management accountant who's going through their certified accountancy training. [They are] doing all [their] exams; [their] ACCT and I have another member of staff who is doing [their] AAT. Then we're looking at alternative kind of routes for possibly procurement training for somebody else. So, it's more like ad hoc I suppose. If somebody says I'd really like to do it, we'll look at it and explore it. – *Medium sized MAT with primary and secondary schools*

Attending a conference and/or webinars were frequently reported as a way of keeping up-to-date with developments in their field. Participants described watching various types of webinars delivered by the DfE and education training providers. These might be one-hour sessions on subjects, such as, flexible working, safeguarding, safer recruitment and the single central record. These were valued as some areas could change rapidly.

8.3 Assessing the capabilities of team members to carry out business functions

There were three main ways mentioned in which team leaders were able to assess the capabilities of their team members to carry out their roles and responsibilities. This was through: performance management; team meetings (as an informal approach); and at the recruitment and induction stages of a new staff appointment.

8.3.1 Recruitment and induction of new staff

The recruitment and induction stages of a new staff appointment were the initial opportunities to gauge the capabilities of candidates. Some participants reported having minimum levels of qualifications for roles such as a level 4 in business management.

At the selection stage of recruitment, participants reported using a range of practical assessments to identify if a candidate had the sufficient capabilities for a role, in addition to having relevant qualifications and previous experience. These assessments included, for example, writing tasks, such as writing formal emails. Finally, once appointed and in role, it was common to complete an audit of any mandatory training required of every role, such as health and safety, and to put in place an individual training programme, alongside any general induction programme.

8.3.2 Performance management

Performance management was the most reported way, through which team leaders were able to assess the capabilities of their team members to carry out their roles and responsibilities. In these review meetings, it was possible to examine areas of strength and practices that required development. It was recognised that colleagues often held

very wide briefs and therefore, it was important to carefully analyse any gaps in knowledge, skills and experiences. Additionally, these reviews were reported as an opportunity to look to the future. Very few of the participants reported using a formal grid for assessing competences. The one framework mentioned was the ISBL framework.

8.3.3 Completion of tasks and day to day line management

There was recognition by many of the participants that by the very nature of many of the roles and specific tasks, it became obvious very quickly, if there were any gaps in the knowledge, skills and experiences of a team member. Completing, for example, documentation for internal audits and/or compliance requirements, meant that errors could be quickly identified and additional support, whether that be through a quick conversation, mentoring or some additional training, could and is offered. Similarly, regular team and forum meetings were used as an opportunity to assess the capabilities of individual team members and collectively as a group:

Informally by the questions and feedback that SBM give in the forum meetings allows identification of skills and knowledge gaps. By looking at how or what they have filled in on documents or forms for finance. –
Medium sized MAT with primary schools

8.4 Priorities for developing business capabilities

Priorities for developing business capabilities were very much led by the needs of the business functions, which, in turn, were very individual to the context of each MAT. One of these needs was to respond to the growth of some of the MATs as described by one participant:

I think because we've grown, I think we will have to change. I think we will have to look at the structure and how we work because at the minute the schools have got their own site manager. I think we're probably there or thereabouts at a tipping point where we need to start looking at additional resource into the central team. To almost have mobile site teams to go out to cover sites when there is absence and to maybe group into clusters. – *Medium sized MAT with primary and secondary schools*

Looking to creating and/or expanding a MAT central team around a specific function was particularly the case for HR and estate management teams. Additionally, the plan to align more tasks within several functions meant that professionals would require training in, for example, how to use a new finance software programme, training in a standardised

approach to recruitment across all the schools in a MAT or becoming more familiar with ICFP processes.

Apart from growth, there was recognition that the level of skills and expertise required of business professionals was increasing and that there were challenges with attracting the right professionals, as well as, developing the skills set of the teams already in place. For example, there is a recognition that school buildings are now modern, complex in structure and design, with exacting standards in health and safety. Consequently, their maintenance is more complex. Additionally, in both the school and central teams, estate professionals require management and budgeting skills. As a result, some of the participants described the challenges of recruiting premises staff with sufficient capabilities into the education sector and were planning to investigate what might be done to address this capabilities gap.

From some of the accounts, there was evidence of a lack of availability of training and/or the right level of training. One participant described how the procurement training they had seen and attended was for organisations procuring large multi-million pound contracts and therefore, was not relevant for the context of their MAT. Another described the possibility of utilising the apprenticeship levy for finance and HR, but that there was a need for apprenticeships in procurement and estate management that were more education focused.

9. Summary

The research had two aims. First, it aimed to understand the practices which successful MATs find most effective for managing school resource and that add value. Second, it aimed to understand how school and trust business professionals with responsibility for finance, procurement, estate management, human resources and marketing and communications, gain, develop, demonstrate and maintain capabilities (as manifested by skills, experience and knowledge) in these areas over time.

9.1 Practices and capabilities

All the interview participants reported that the direction of travel in their MAT was to align a variety of business practices across schools if there were clear benefits for the MAT and where resources allowed for this alignment. Alignment was being achieved through, for example, the automation of tasks such as finance and payroll and in how central and school business teams were being structured around the business functions to implement this greater alignment.

There was a trend to bring the implementation of tasks in-house, whenever there were strong incentives to do so, such as, making financial savings and/or improved quality of central team support. This was combined with a trend towards employing business professionals with industry level qualifications and experience, whether that be, for example, in HR, marketing and communications or finance.

According to the participants, these practices added value in several ways. Almost all the participants could point to efficiencies in time and associated cost savings being made in the short and/or long term. The practices were reported as being effective as they facilitated greater consistency and accuracy, such as, through the implementation of aligned finance processes. Practices could be effective in that they improved compliance with for example, health and safety regulations. Participants described how many of the practices, indirectly, supported pupils' development and learning, whether that be through reducing some of the business operation workload of senior leaders to allow them to focus on teaching and learning, or by making financial savings that could be used to improve the learning environment.

Across the business functions, there were similar trends in how professionals gained the necessary capabilities to secure their MAT roles, with industry standard qualifications and experience gained from previous roles and sectors being the two main routes. Most of the professionals interviewed did not have experience of the schools' education sector before joining the MAT, of the remainder some had worked their way up the same organisation and a very small minority had moved between trusts.

Participants described how membership of professional networks, on the job learning and making the most of networks were the main ways they kept up-to-date and developed in their roles. Performance management, completion of tasks and daily line management were the main ways in which team leaders assessed the capabilities of team members.

9.2 Wider findings

Notwithstanding the similarities in these overarching trends, there was considerable variation in the detail of the practices. There was not a 'one size fits all' approach to effective practices. Variations were evident in, for example, the types of commercial software programmes used to automate the finance, HR or estate management functions. The precise structure of central teams differed between MATs. Some of the smaller MATs for example, did not always have a HR, procurement and/or marketing and communications professional. In some instances, the COO was also the CFO and held responsibility for procurement. This was the same for the exact balance of the roles and responsibilities between central and school teams around a specific function. Even within a single MAT, there was variation in the level of the development of the functions.

From the participants' accounts, it was evident that each function was not implemented in isolation. This is not an unexpected observation, but the findings highlight the extent to which there is a need for the integration of practices across functions to maximise the potential of a MAT to meet its strategic and operational aims. Taking the example of recruitment and retention, participants in the interviews often spoke of the need for highly developed HR, finance, marketing and communications practices.

At the same time, the interview analyses showed that the participants and their central MAT teams, were very sensitive to the everyday pressures on schools and the tensions of how aligning processes and systems might be experienced by schools seeking to retain their autonomy and individuality. One business professional in a marketing role, for example, described how a discussion about a school's website content might not always be a priority for a busy headteacher. Major changes to school business practices, such as the procurement of one contractor for catering, included built in opportunities for consultation before final decision making. Finally, it was evident that school and central business teams met regularly, formally and informally, across the academic year to support communication and collaboration within and across the teams.

9.3 Further questions for investigation

Based on these findings, the following are highlighted as further areas of investigation, to increase our understanding of the context:

- the majority of professionals interviewed had come from outside of the school education sector, were highly qualified in their respective fields and came with extensive and often very relevant and/or applicable experience to their respective MAT roles. More in-depth research is required to establish whether more business professionals can be developed within the school sector and what a 'golden thread' of professional development might look like for business professionals
- the research, as appropriate to the research aims, focused on the perspective of business professionals only. However, the views of school senior leaders, teachers and support staff on some of the topics covered would add depth to our understanding, especially in relation to how they experience any changes in business practices.

Appendix 1: Interview Topic Guide

Trust and Academy Business Practices: Sample Questions

Function 1: FINANCE

1. Can we first clarify your job title(s) and your role (s) in relation to finances?
2. How long have you worked in this role?

Aim 1: Practices

For the finance function, the specific tasks we are interested in are:

- Financial administration and regulatory compliance
 - Financial reporting and monitoring
 - Resource management (not estates or IT resources - in Estates Management function)
 - Continuous improvement and the use of data
 - Non-grant income and trading activity
3. Please state which of the tasks you would like to talk about today.
 4. Can you describe one or two practices in relation to any of those five tasks that you think are valued in your academy or MAT.
 - Purchase Order process
 - BACS/cheque run process
 - Chasing debtors
 - Monthly financial monitoring
 - Budgeting support including assumptions
 - Benchmarking
 - Integrated Curriculum and Financial Planning analysis
 - Management of internal and external audit
 - VAT reporting and collection
 - Management and reporting of restricted funds e.g., Devolved Formula Capital
 - Writing of grant applications
 - Creation of annual financial statements (accounts)
 - Other
 5. Can you describe how these practices are implemented?
 - Yours and others' specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - Trust (centralised) or school (local) level responsibility

- What systems are used e.g. paper based process or electronic
6. How do these practices add value to your academy and/or MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
- It is a more *efficient practice* e.g., an automated financial management system to streamline processes, central purchasing functions
 - It is a more *effective practice* (e.g. lettings increased income, undertaking regular financial forecasting or scenario planning)
 - Potential to *enhance/contribute to the learning* and development of pupils e.g. estimate time saved from Headteacher / school SLT which can be spent on Teaching and Learning
 - Evidence of *continuous improvement* e.g. tracking and examining KPIs on certain financial measures, practices to identify areas for improvement in relation to adherence to the academies trust handbook requirements
 - It is a more *cost effective* way of working e.g. reduction in staff time
 - It is a *sustainable* way of working e.g. financial planning that prioritises financial resilience over the long term; “green” environmentally conscious decisions which lower operating costs in the long term
 - *Greater collaboration* within the Trust and academies (e.g. SLT, governance) and/or externally
 - Other
7. How do you (academy/MAT) achieve the practices you’ve mentioned? What skills and knowledge do your staff need to implement these practices well, given how you achieve them?
- Mainly in-house by e.g. they may say they complete the Integrated Curriculum and Financial Planning tool well and it is valuable; they do it mainly in-house and need staff with understanding of key ICFP metrics, knowledge of financial software or Excel, skills in interpreting charts, introduced centralised electronic Purchase Order process, requiring detailed system knowledge and set up, provision of training for non-finance staff, support and help desk for queries and new starters
 - Mainly out sourced by outsource internal audit rather than have qualified auditor on payroll, need skills to write the specification for audit tender, interview and appoint successful bidder, manage relationship and contract
 - Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for finance, gain, develop, and

demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain the relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?
 - Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - ‘On the job’
 - Other

9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?
 - Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - ‘On the job’
 - Other

10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?

11. How do or would you assess the skills and knowledge of people working in the finance function in your team, to know they can meet their responsibilities?
 - A formal grid for assessing competencies linked to person specification in Job Description
 - Links to annual appraisal and performance cycle
 - Mandatory / voluntary training provided and is it role specific or nuanced to level of role
 - Ways of keeping up-to-date with any statutory or regulatory changes
 - Other

12. Is there anything you would like to add that we have not covered, which you think is relevant for the purposes of this interview?

Function 2: PROCUREMENT

1. Can we first clarify your job title(s) and your role (s) in relation to procurement?
2. How long have you worked in this role?

Aim 1: Practices

For the procurement function, the specific tasks we are interested in are:

- Procurement strategy and policies
 - Needs analysis and specification development
 - Procurement process
 - Supplier and contract management
3. Please state which of the tasks you would like to talk about today.
 4. Can you describe one or two practices in relation to any of those four tasks that you think are valued in your academy or MAT.
 - Preferred supplier lists
 - Procurement and management of energy contract
 - Procurement and management of cleaning contract
 - Procurement and management of catering contract
 - Supplier spend analysis
 - Management of tenders including writing of specification, criteria selection and evaluation, and use of frameworks
 - Supplier relationship and contract management e.g. MFD's
 5. Can you describe how these practices are implemented?
 - Yours and others' specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - Trust (centralised) or school (local) level responsibility
 - Systems are used e.g. paper based process or electronic
 6. How do these practices add value to your academy and/or MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
 - It is a more *efficient practice* e.g. central purchasing functions, creation of preferred supplier lists, focussed negotiations based on detailed supplier spend analysis
 - It is a more *effective practice* e.g. increased size of contracts leading to better terms and conditions, professional contract management leading to improved service delivery

- Potential to *enhance the learning* and development of pupils e.g. examples of wide and thorough procurement process leading to better curriculum software
- Evidence of *continuous improvement*
- It is a more *cost effective* way of working e.g. reduction in staff time, lower prices from bulk buying and economies of scale
- It is a *sustainable* way of working e.g. benefits of moving to sustainable providers such as low carbon energy providers
- *Greater collaboration* within the Trust and academies (e.g. SLT, governance) and/or externally e.g. benefits of using same systems and/or suppliers leading to greater alignment and opportunities to support
- Other

7. How do you (academy/MAT) achieve the practices you've mentioned? What skills and knowledge do your staff need to implement these practices well, given how you achieve them?

- Mainly in-house by e.g. Procurement Manger may manage tenders, requiring detailed knowledge of writing of specification, criteria selection and evaluation, and use of frameworks, analytical skills for supplier spend analysis, relationship and contract management skills
- Mainly out sourced by e.g. use of external procurement consultants to support on specialised or high value, or contentious procurement
- Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for procurement, gain, develop, and demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?

- Formal qualifications - please describe
- In-house training - please describe
- External training - please describe
- Experience from a previous role previous sector
- Institute for School Business Leadership (ISBL) – Professional Standards
- 'On the job'
- Other

9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?
 - Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - 'On the job'
 - Other

10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?

11. How do or would you assess the skills and knowledge of people working in the procurement function in your team, to know they can meet their responsibilities?
 - A formal grid for assessing competencies linked to person specification in Job Description
 - Links to annual appraisal and performance cycle
 - Mandatory / voluntary training provided and is it role specific or nuanced to level of role
 - Ways of keeping up-to-date with any statutory or regulatory changes
 - Other

12. Is there anything you would like to add that we have not covered, which you think is relevant for the purposes of this interview?

Function 3: HUMAN RESOURCES

1. Can we first clarify your job title(s) and your role (s) in relation to human resources (HR)?

2. How long have you worked in this role?

Aim 1: Practices

For the HR function, the specific tasks we are interested in are:

- People strategy
- Workforce planning
- Performance management (PM) and continuing professional development (CPD)
- Human resource management

3. Please state which of the tasks you would like to talk about today.
4. Can you describe one or two practices in relation to any of those four tasks that you think are valued in your academy or MAT.
 - Talent management / Succession planning / Leadership development
 - HR data analysis including turnover, demographic, EDI data analysis
 - Absence and sickness management
 - Recruitment process including safer recruitment
 - Regulatory compliance including Single Central Record (SCR) , DBS
 - Staff training and continuous professional development programmes
 - Assessment of flexible and agile working requests
 - Job evaluations
 - Pay scale and progression structure
 - Staff benefits
 - Statutory compliance and reporting including pay and gender gap, workforce census
 - Performance management process
 - Payroll
 - Conflict resolution and case work
 - Trade Union relations
 - Other
5. Can you describe how these practices are implemented?
 - Yours and others' specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - Trust (centralised) or school (local) level responsibility
 - What systems are used e.g. paper based process or electronic
6. How do these practices add value to your academy and/or MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
 - It is a more *efficient practice* e.g. single return for compliance and statutory reporting, single HR policies for example flexible and hybrid working etc, single pay scales and progression structure, management Trade Union relationships
 - It is a more *effective practice* e.g. wider range of staff benefits supporting recruitment, more options for talent management / succession planning / leadership development to support retention
 - Potential to *enhance/contribute to the learning* and development of pupils e.g. ability to support staff in cross MAT working ensuring pupils benefit from

sharing of best practice, lower turnover of staff strengthening pupil, teacher connections

- Evidence of *continuous improvement* e.g. monitoring of HR KPI's
 - It is a more *cost effective* way of working e.g. reduction in staff time e.g. measures to improve staff retention (such as - staff benefits, progressive pay structure, good training and CPD, strong line management processes) leading to lower turnover leading to less time lost to recruitment and training of new staff
 - It is a *sustainable* way of working e.g. staff benefits encouraging move to electric cars
 - *Greater collaboration* within the Trust and academies e.g. SLT, governance and/or externally the ability to support staff in cross MAT working providing development opportunities and ability to share best practice
 - Other
7. How do you (academy/MAT) achieve the practices you've mentioned? What skills and knowledge do your staff need to implement these practices well, given how you achieve them?
- Mainly in-house by e.g. introducing centralised HR database, requiring detailed system knowledge and set up, provision of training for staff, support and help desk for queries and new starters
 - Mainly out sourced by e.g. outsource legal HR support rather than have qualified solicitor on payroll, outsourced payroll requiring contract and relationship management experience
 - Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for HR, gain, develop, and demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?
- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - 'On the job'

- Other
9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?
- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - 'On the job'
 - Other
10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?
11. How do or would you assess the skills and knowledge of people working in the HR function in your team, to know they can meet their responsibilities?
- A formal grid for assessing competencies linked to person specification in Job Description
 - Links to annual appraisal and performance cycle
 - Mandatory / voluntary training provided and is it role specific or nuanced to level of role
 - Ways of keeping up-to-date with any statutory or regulatory changes
 - Other
12. Is there anything you would like to add that we have not covered, which you think is relevant for the purposes of this interview?

Function 4: ESTATE MANAGEMENT (buildings, digital infrastructure and technology)

1. Can we first clarify your job title(s) and your role (s) in relation to estate management?
2. How long have you worked in this role?

Aim 1: Practices

For the estate management function, the specific tasks we are interested in are:

- Strategic estate management
- Effective use of estate resources

- Managing estate projects
 - Maintenance, facilities and grounds management
 - Health and safety compliance
3. Please state which of the tasks you would like to talk about today.
4. Can you describe one or two practices in relation to any of those five tasks that you think are valued in your academy or MAT.
- Creation of asset management plan
 - Creation of planned maintenance schedules
 - Creation and management of grounds management plans
 - Delivers elements of sustainability strategy
 - Responsibility for areas of regulatory compliance
 - Responsibility for elements of Health & Safety compliance and estates risk management including regular risk assessments and audits
 - Commissions estates surveys on condition, compliance, suitability and sufficiency
 - Project management of capital projects
 - Management of planning process
 - Provision and testing of business continuity, disaster recovery, critical incident and contingency planning
 - Management of community use (lettings)
 - Other
5. Can you describe how these practices are implemented?
- Yours and others' specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - Trust (centralised) or school (local) level responsibility
 - What systems are used e.g. paper based process or electronic
6. How do these practices add value to your academy and/or MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
- It is a more *efficient practice* e.g. sharing of common estates policies (H&S, sustainability etc), function delivered by experts who are therefore more efficient
 - It is a more *effective practice* e.g. wider scope of options available in larger Trusts for BCP, less disruption in schools from well planned and managed projects work, safer environment from detailed risk assessment process

- Potential to *enhance/contribute to the learning* and development of pupils e.g. provision of clean, safe, environment, less disruption from well planned maintenance and capital projects
 - Evidence of *continuous improvement* e.g. reduction from energy usage and costs from effective sustainability strategy, improvement of condition of facilities, reduction in serious incident KPI's e.g. trips/slips etc
 - It is a more *cost effective* way of working e.g. reduction in staff time, well managed estate can boost lettings income, reduction in energy costs
 - It is a *sustainable* way of working e.g. reduction in energy usage and costs from effective sustainability strategy
 - *Greater collaboration* within the Trust and academies (e.g. SLT, governance) and/or externally e.g. network of Trusted suppliers and contractors who can work across different schools, sharing of policies and BCP work
 - Other
7. How do you (academy/MAT) achieve the practices you've mentioned? What skills and knowledge do your staff need to implement these practices well, given how you achieve them?
- Mainly in-house by e.g. centralised compliance database, requiring detailed system knowledge and set up, provision of training for staff, support and help desk for queries and new starters/ Need for team to have detailed regulatory and compliance knowledge including health and safety legislation and risk assessment experience such as experience of compiling and managing estates planned preventative maintenance plans, project management of capital projects, and ground maintenance plans
 - Mainly out sourced by e.g. surveyors for surveys on condition, compliance, suitability, sufficiency and sustainability/ project managers for large capital project delivery - requires team to have knowledge and skills in relationship and project/contract management
 - Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for estate management, gain, develop, and demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?

- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - ‘On the job’
 - Other
9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?
- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - ‘On the job’
 - Other
10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?”
11. How do or would you assess the skills and knowledge of people working in the estate management function in your team, to know they can meet their responsibilities?
- A formal grid for assessing competencies linked to person specification in Job Description
 - Links to annual appraisal and performance cycle
 - Mandatory / voluntary training provided and is it role specific or nuanced to level of role
 - Ways of keeping up-to-date with any statutory or regulatory changes
 - Other
12. Is there anything you would like to add that we have not covered, which you *think* is relevant for the purposes of this interview?

Function 5: MARKETING AND COMMUNICATION

1. Can we first clarify your job title(s) and your role (s) in relation to marketing and communication?
2. How long have you worked in this role?

Aim 1: Practices

- For the marketing and communication function, the specific tasks we are interested in are:
 - Marketing and communications strategy
 - Brand and reputation management
 - Marketing and communications management
 - Income generation
3. Please state which of the tasks you would like to talk about today.
4. Can you describe one or two practices in relation to any of those four tasks that you think are valued in your academy or MAT.
- Creation of a marketing strategy and plan to promote schools and Trust in their local community and support pupil numbers
 - Manage brand by providing templates and branding support
 - Commission marketing and promotional materials
 - Manage reputation through devising communication strategy and effectively dealing with public relations and media
 - Proactive campaign plans to raise Trust and school awareness for pupil and staff recruitment
 - Manage websites and maintain regulatory compliance
 - Other
5. Can you describe how these practices are implemented?
- Yours and others' specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - Trust (centralised) or school (local) level responsibility
 - What systems are used e.g. paper based process or electronic
6. How do these practices add value to your academy and/or MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
- It is a more *efficient practice* e.g. single platform used for websites, with centralised updating of statutory policies avoiding repetition, provision of templates and branded materials avoiding need to design and create individual products
 - It is a more *effective practice* e.g. positive branding image supporting professional image, pupil numbers, and community engagement
 - Potential to *enhance/contribute to the learning* and development of pupils e.g. clearly communicated vision and mission statements strengthening school

ethos and inherent impact on outcomes. Strong marketing supporting pupil numbers and hence school income enabling greater resources for teaching and learning

- Evidence of *continuous improvement* e.g. monitoring of social media KPI's around usage and engagement
 - It is a more *cost effective* way of working e.g. reduction in staff time, provision of templates and branded materials avoiding additional design costs, higher community profile can increase lettings income and donations
 - It is a *sustainable* way of working e.g. strong and consistent communications of sustainability strategy lead to changes in behaviour
 - *Greater collaboration* within the Trust and academies (e.g. SLT, governance) and/or externally e.g. common Trust brand bring together academies and allow to coalesce around MAT identity, vision and values
 - Other
7. How do you (academy/MAT) achieve the practices you've mentioned? What skills and knowledge do your staff need to implement these practices well, given how you achieve them?
- Mainly in-house by e.g. management of school websites requiring specific website maintenance skills, initial template design requiring creative input along with software skills, knowledge of social media metrics, experience of managing media and public relations
 - Mainly out sourced by e.g. local marketing agencies to support with local campaigns requiring negotiation and contract management skills, professional photographers for marketing images
 - Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for marketing and communications, gain, develop, and demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?
- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards

- 'On the job'
 - Other
9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?
- Formal qualifications - please describe
 - In-house training - please describe
 - External training - please describe
 - Experience from a previous role previous sector
 - Institute for School Business Leadership (ISBL) – Professional Standards
 - 'On the job'
 - Other
10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?"
11. How do or would you assess the skills and knowledge of people working in the marketing and communications function in your team, to know they can meet their responsibilities?
- A formal grid for assessing competencies linked to person specification in Job Description
 - Links to annual appraisal and performance cycle
 - Mandatory / voluntary training provided and is it role specific or nuanced to level of role
 - Ways of keeping up-to-date with any statutory or regulatory changes
 - Other
12. Is there anything you would like to add that we have not covered, which you think is relevant for the purposes of this interview?

Function 6: OPERATIONAL LEADERSHIP - CHIEF OPERATING OFFICER INTERVIEW

1. Can we first clarify your role and responsibilities in the MAT?
2. How long have you worked in this role?

Aim 1: Practices

For the operational leadership function, the specific tasks we are interested in are:

- Managing people and stakeholders
- Governance and accountability

- Managing risk
 - Innovation and change management
 - Social responsibility
 - Linking operational leadership to school's or trusts strategic aims
3. Please state which of the tasks you would like to talk about today.
4. Can you describe one or two practices in relation to any of those six tasks that you think are valued in your MAT.
- Ensuring alignment of organisational structures, policies, processes and systems with our culture and values and overall strategic plan
 - Extent to which teams are working collaboratively in partnership or in silo's – is there a lot of duplication of info sharing?
 - Extent do schools influence the overall direction of MAT – what feedback mechanisms exist?
 - Compliance with statutory reporting
 - Ensure systems are safe from cybersecurity threats and compliant with GDPR
 - Data analysis including benchmarking to highlight opportunities and risk
 - Strong risk management framework including risk assessment and creative mitigation strategies which is embedded throughout the Trust
 - Audits used as a learning opportunity or judgement?
 - Brings evidence-based learnings from wider educational sector research into the Trust to the benefit of staff and pupils and fosters culture of continuous improvement
 - Manages significant change projects smoothly
 - Introduce systems to streamline processes
 - Embeds sustainability into decision making process
 - Other
5. Can you describe how these practices are implemented, how you do them?
- Specific roles and responsibilities
 - How implementation of tasks and functions are distributed across a MAT
 - To what extent are these tasks run/led/managed from the centre and what is the school's involvement
 - How does the messaging work? What communication channels are there between the centre and the schools and between the schools
6. How do these practices add value to your MAT? In what ways are they effective? Please can you provide examples. Value might be in terms of:
- It is a more *efficient practice* e.g. introduction of new system or process, diminishing number of times info needs to be entered into systems

- It is a more *effective practice* e.g. audits being used as a learning opportunity to bring about positive change rather than a tick box exercise, improved links between function teams leading to better outcomes of management projects
 - Potential to *enhance/contribute to the learning* and development of pupils examples of new methods learned from outside and incorporated into the Trust, or learnings from internal data analysis and sharing of best practice
 - Evidence of *continuous improvement* e.g. use of wide range of metrics over a sustained period
 - It is a more *cost effective* way of working e.g. reduction in staff time e.g. use of benchmarking and ICFP to support review of staff deployment, or create more effective timetable etc
 - It is a *sustainable* way of working e.g. impact of embedding a sustainable strategy on behaviours can lead to reduced consumption and greater recycling
 - *Greater collaboration* within the Trust and academies (e.g. SLT, governance) and/or externally e.g. impact from internal and external; networks on sharing best practice and supporting colleagues to find solutions
 - Other
7. How does the MAT achieve the practices you've mentioned? What skills and knowledge do you and/or your staff need to implement these practices well, given how you achieve them?
- Mainly in-house by e.g. strong internal relationships with key stakeholders, Trustee Board, CEO, Executive Leaders, strategic thinking, qualitative and quantitative data analysis skills, risk assessment, analysis and management skills, clear leadership of vision, values and culture, adaptive management style
 - Mainly out sourced by e.g. wide membership of education and research networks, strong relationship building with Trust partners. Beneficial management of internal and external auditor relationship
 - Not sure

Aim 2: Capabilities

In this second part of the interview, we would like to explore in more depth, how academy and trust business professionals with responsibility for Operational Leadership, gain, develop, and demonstrate the knowledge, skills and experience (capabilities) to carry out their role and responsibilities in this area over time.

8. How did you gain relevant/required skills and knowledge to meet your main responsibilities before you moved into the role?

- Formal qualifications - please describe
- In-house training - please describe
- External training - please describe
- Experience from a previous role previous sector
- Institute for School Business Leadership (ISBL) – Professional Standards
- ‘On the job’
- Other

9. Since moving into the role, how have you further developed skills and knowledge to support your main responsibilities?

- Formal qualifications - please describe
- In-house training - please describe
- External training - please describe
- Experience from a previous role previous sector
- Institute for School Business Leadership (ISBL) – Professional Standards
- ‘On the job’
- Other

10. What responsibility do you think you need to improve on, and how are you achieving, or planning to achieve, that?”

11. Is there anything you would like to add that we have not covered, which you think is relevant for the purposes of this interview?



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