

Report Summary

Building Trusts:
MAT leadership
and coherence of
vision, strategy
and operations

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Foreword

School improvement at scale can only occur with great leadership. The best multi-academy trusts (MATs) are transforming the lives of disadvantaged children and doing it across multiple schools, many of which had previously been underperforming before joining the MAT. This is thanks to the work of great leadership, teaching and governance at every level of the organisation.



Such is the impact of a great academy trust – transforming pupil outcomes at scale – we wanted to understand precisely what these high-performing MATs do and what choices their leaders make. As MATs are so new, we need new research to understand them and it is vital that we share what we find with the leaders of trusts that are starting or undertaking their development journey. We want them to learn from those who have gone before them.

This research is the largest study of its kind to date and we have worked with over 40 CEOs and surveyed the staff from 22 MATs. The insight we have gathered shows that two things are critical to running an effective and sustainable MAT: leadership and coherence. The highest-performing MATs had coherent strategies, and these strategies were defined and shaped by the CEOs, executives and trustees.

Trusts of all sizes were involved in the research but these findings are most vital for CEOs of small and medium-size MATs

Trusts of all sizes were involved in the research but these findings are most vital for CEOs of small and medium-size MATs, their trustees, and schools considering joining MATs. These leaders face a number of challenges as their trusts develop – and we have identified the ‘break points’ that MATs face as they grow.

Our motivation is to codify what the best MATs do so more leaders can use it to inform their approach. We will also be using the findings in the Executive Educators programme that we run for executive leaders looking to grow and develop sustainable MATs. I believe that every leader who reads this report will find something that will help them make sense of what they have experienced in leadership or think in a different way about the challenges they face.

While the research has lots to say about operational models and strategy, it always comes back to one thing: the MAT’s mission and purpose is the north star that guides everything. The mission that drives us at Ambition is to support the transformational work of school leaders who are delivering improvements in schools and ensuring that disadvantaged children can have the great education that will open doors for them in their adult lives. This summary shares our view on how MAT leaders can do this most effectively.

James Toop
CEO, Ambition School Leadership

Introduction

This report summarises key findings from the latest phase of Ambition School Leadership's research into multi-academy trusts (MATs). This report has two sections. The first focuses on the strategies that MATs follow and how these link to their operating models. Later, we examine how growth, geography and performance can create break points¹ in MATs' strategy and operations, and the way that MATs respond to this.

The research asked:

1. How does a MAT's vision translate into its school improvement strategy and operating model?
2. How are a MAT's strategy and operations affected by growth?
3. What differentiates high and low performers?

Key research findings:

1. MAT vision and mission statements differ in how clearly and specifically they describe the outcomes they want for their pupils and in how much emphasis they place on academic performance above other measures of success. Higher performing trusts appear more likely to explicitly cite standards and outcomes when defining their overall vision.
2. The key strategic choice for MATs is how to deliver school improvement. Two dominant approaches emerged from our research which reflect opposite ends of a strategic spectrum: preserving the autonomy of individual schools; or achieving consistent teaching and pedagogy across schools.
3. MAT leaders that choose a school improvement strategy of achieving consistent teaching and pedagogy will need to achieve alignment across their schools. They have to make a cultural choice about whether to achieve this through central direction or collaborative convergence. These approaches are not mutually exclusive; different approaches can be used in different areas of alignment.
4. MAT operating models face 'break points'. This is a moment of non-incremental change where a MAT has to stop a previous operational approach and make a shift. MAT leaders have to look ahead to adapt their operating model to future context and needs.

Ambition Perspective

MATs are complex organisations, so their effectiveness depends on the quality of leadership from the CEO, executive team and board. We believe the highest performing MATs have a coherent approach which aligns their vision and mission, their school improvement strategy and operating model.

In order to do this, executive leaders need to be clear how their MAT adds value and helps schools deliver better outcomes working together than they would have done working independently. We believe that all schools in the MAT need to be aligned around a common approach to school improvement. In the MATs where we see this happening, a common approach is usually developed around curriculum, assessment and teacher training and development.

1. This is a point of non-incremental change where the MAT has to break from its previous strategy or operational approach and make a shift.

Overview

The research was a three-part project. Ambition commissioned the Education Policy Institute to carry out a quantitative analysis examining whether there were consistent structural or pupil characteristics associated with high-performing trusts. The results were published in November 2017.

Alongside this, Ambition commissioned in-depth case studies of 12 multi-academy trusts that were either high performing according to the MAT performance tables, or were too small to be in the performance tables but had a clearly articulated strategy.

We found that there was no single structural or pupil characteristic associated with high-performance, but our case studies showed that high-performing trusts could clearly articulate a specific vision and mission, which informed their strategy and operating model. We therefore chose to investigate whether the coherence of a MAT's vision, strategy and operating model was related to performance.

To do this, Ambition worked with LKMco and CJK Associates to contact the CEOs of all MATs with seven or more schools, asking them to participate in an interview and to complete a survey. We also asked the CEOs to send the survey to their staff. The interviews and surveys focused on understanding the trust's strategy, how it linked to the trust's operating model, and how this evolved with growth. We interviewed 34 CEOs. 17 MATs had enough survey data to be included in our statistical analysis.²

This paper summarises our key findings and presents them alongside Ambition's 'Perspective'; our take on the implications of the research for multi-academy trust CEOs.

We have formed these points of view from our experience of working with hundreds of executive leaders and with partners including the charity Impetus-PEF, who support charities to grow their impact. Over the last three years, they have worked with the Dixons Academy Trust, helping them to refine their mission and school improvement model, and to develop and deliver a three-year growth plan.

This paper is intended as a useful guide for CEOs who are building their MATs and for the trustees working with them. You can find the full report and our previous research paper on our website.

2. We received 346 responses to our survey from 22 MATs, but only included a MAT in our cluster analysis if we received at least five responses from staff in that MAT.

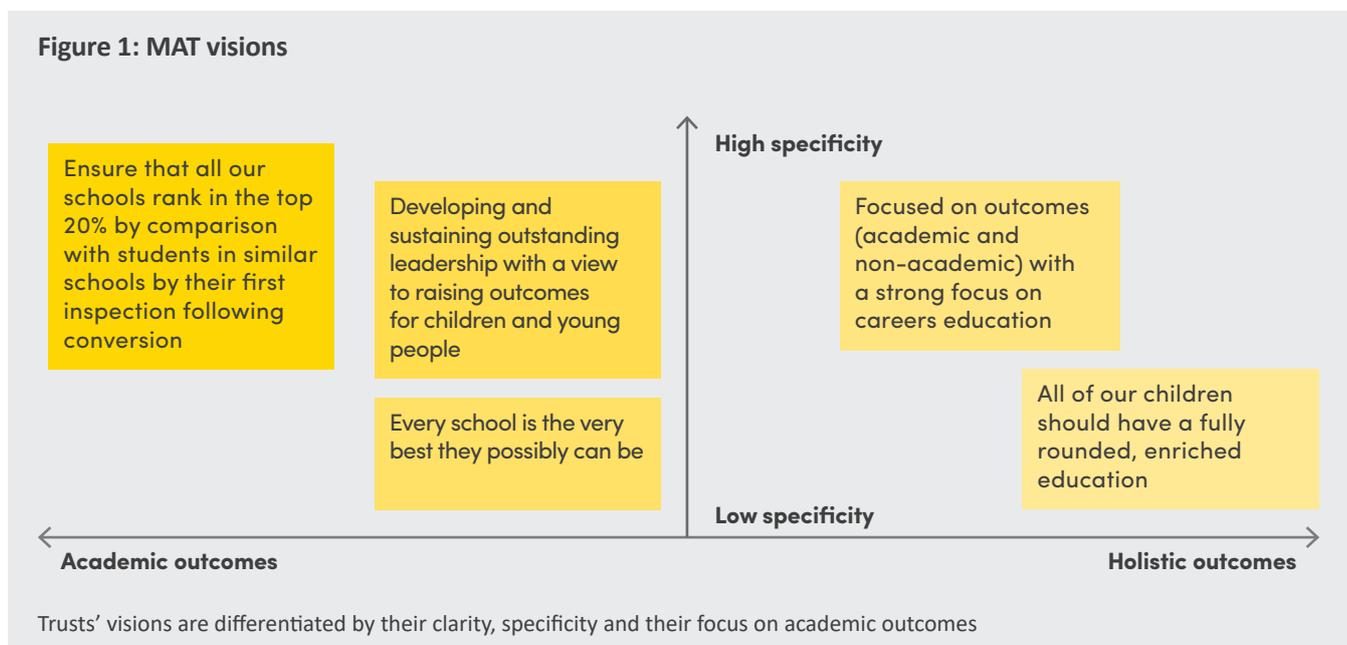
Vision and mission

A 'vision statement' is about the change a MAT wants to happen in the world, and its 'mission' is concerned with how that trust plans to achieve those changes.

We compared the vision statements described by the 34 CEOs that we interviewed. All MAT visions make reference to children's outcomes, but we found variation in:

- The clarity and specificity of the MAT's vision
- The extent to which academic outcomes and exam results have primacy over other outcomes

Higher performing trusts (as defined by results in the performance tables, Ofsted and schools' financial balance) appeared more likely to explicitly cite standards and outcomes when defining their overall vision.



Ambition Perspective

Establishing a clear vision and mission, that all staff are engaged with, should be the starting point for any CEO seeking high-performance. Working with a range of MATs, we have found that the strongest mission statements specify which schools and localities a MAT will work with.

In line with Impetus-PEF's **Driving Impact approach**, a MAT's leadership team and trustees board should make time to have challenging conversations to nail down their mission and make sure everyone is aiming for the same outcomes. There are two key things to decide:

- What mix of schools do you want to make up your MAT? Will you look for primaries or secondaries, and in particular geographies? What balance do you want of schools at different stages of their improvement journey?
- What pupil outcomes are most important to you? 'Just' attainment? Or are there specific skills or experiences that your pupils should leave schools with?

Once your mission is clear, all your decisions, operations, KPIs, policies and interventions must support its delivery. The chances of a successful journey are vastly improved if the leadership are absolutely clear and aligned on their destination.

Strategy

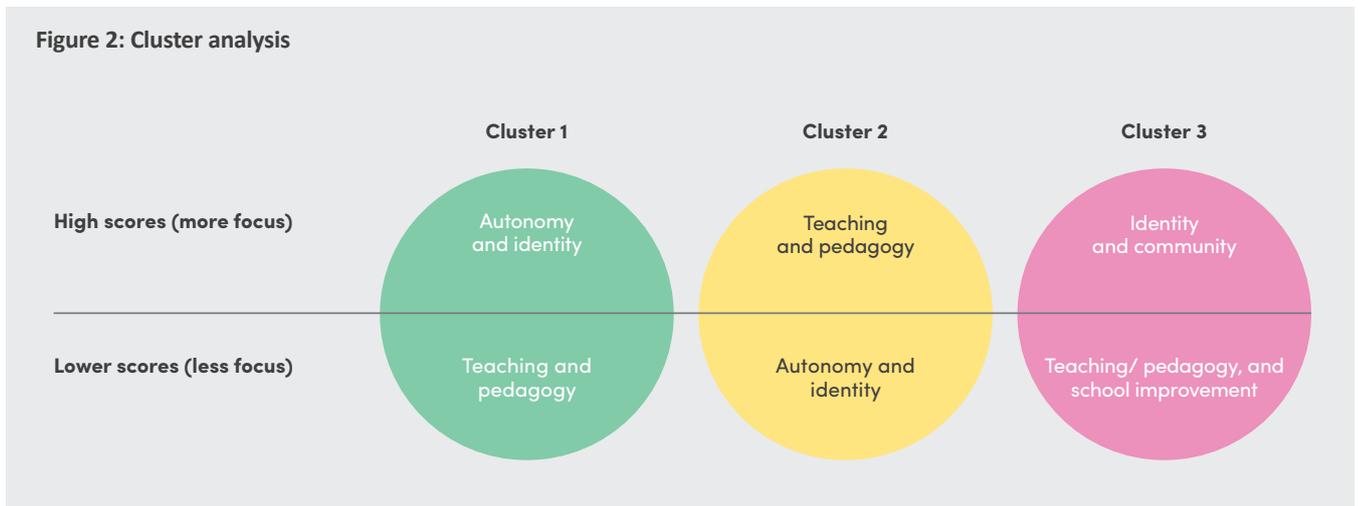
We asked the MAT CEOs and staff that we surveyed to rate how well different strategic statements described their MAT. We analysed the results of 17 MATs to find out whether there were any patterns associated with certain strategic statements.

The analysis identified two clear groups representing each end of a spectrum, and a third that was more tentative, containing only two MATs. Given the small size of Cluster 3, our summary focuses on findings linked to Clusters 1 and 2. The key strategic choice for school improvement centres around what MAT leaders believe is the best way to raise standards.

The main groups identified through the statistical analysis reflect two ends of a spectrum:

- Cluster 1: Retaining the autonomy of school leaders and local governing bodies
- Cluster 2: Embedding a common curriculum and pedagogy across all academies

Figure 2: Cluster analysis



Our interviews showed that MATs have different aspirations for the ultimate level of consistency that they wanted to see across their schools in different areas, and have made differing levels of progress in achieving it.

“Unique selling points?...A chance to run your curriculum in the way you want to do it.” (MAT 31)

“...curriculum is quite individual to each school, but the pedagogy, that’s where there’s more similarity, and that’s because you need to know what good looks like in terms of good teaching in any of our schools...” (MAT 27)

“...in every subject that you go to in the [MAT], we have planned out in detail how each subject’s curriculum needs to be delivered, including the allocated amount of time that needs to go with the rubric of the examination itself.” (MAT 30)

Focusing on autonomy with respect to school improvement does not necessarily mean MATs avoid standardising other areas of operation. Cluster 1 and Cluster 2 MATs both emphasised securing back office efficiencies and freeing up schools from administration and operations.

Ambition Perspective

An effective school improvement strategy sits at the core of any MAT. In line with the approach that Impetus-PEF took with Dixons, we believe that there should be a tight link between mission, school improvement model and wider strategic plans.

Your school improvement approach should show how academies working within your MAT can achieve pupil outcomes that are stronger than, if they were working individually. It should articulate how you support and challenge your academies effectively so that pupils reach the outcomes you most care about and the MAT fulfils its mission. The MAT CEO is ultimately accountable for the performance of all the trust's academies. Recognising this can be a catalyst for deciding how the MAT will drive improvement in pupil outcomes.

Your approach will involve choices about where the MAT wants to give autonomy to schools, and where the MAT wants to align or standardise. These decisions should then inform other key drivers such as your scheme of delegation and central leadership structure. School improvement choices are different from choices about back office functions where we found many MATs are already centralising.

Once your school improvement model is agreed you can look at the implications of different growth scenarios on the costs of your model. By considering these different scenarios you can decide on what an ambitious but achievable three-year growth plan looks like.

It is vital to test whether your school improvement strategy is future-proofed (against a change in scale, a change in school performance, finance and leadership capability, the changing local and national context).

There was not enough quantitative evidence to suggest which school improvement approach had greatest impact but, based on our wider experience, we believe that all schools in the MAT need to be aligned around a common approach to school improvement. In the MATs where we see this happening a common approach is usually developed around curriculum, assessment and teacher training and development.

Achieving alignment on school improvement

MAT leaders who choose a school improvement strategy of aligning around a common way of doing things have to make a cultural choice about how to achieve this aim.

We found MAT leaders can achieve alignment by different means:

- Centralisation where a central individual or team **defines** one way of doing things
- Centrally-supported collaborative convergence: a central team **facilitates** collaboration that results in one way of doing things

MAT leaders can use different approaches in different areas of operation.

MAT leaders can use evidence to decide on their preferred way of doing things and to create a compelling case for change. They may refer to an existing research base, or they can use evidence from within the MAT to identify which strategies are working best within their academies. This evidence creates a case for other schools aligning around the same approach.

“We all do basically Singapore maths, not least because we’ve seen a real positive change in attitudes and in rates of learning and in rates of progress.” (MAT 28)

Once a MAT has achieved alignment around a common way of doing things, whether through collaborative convergence or central definition, they have to decide what to do when a new school joins.

This presents a possible break point for collaborative convergence: what do you do when alignment has been achieved and then a new school is brought on board, which hasn’t contributed to the debate?

Aligning identity

MATs can develop a common identity across the trust in visual and non-visual ways. Items such as lanyards and school logos can be important for creating a sense that everyone works for the same organisation. However, establishing a common mission, vision and set of values can also ensure that all leaders are aligned in their decision making and have a shared sense of their aims within the trust, even if their schools look and feel very different.

Responses to standardisation

In our survey, we asked MAT CEOs and staff which areas of their MAT would benefit from more or less standardisation. There were no areas where staff wanted less standardisation.

The greatest call for more standardisation was around:

- Information management systems and the use of information
- Back office services
- Development of senior school staff

Ambition Perspective

MAT leaders who choose to pursue alignment have a choice about how to achieve it. Key decisions can be taken at the centre, or academy leaders across the trust can be asked to define a common approach, which we call 'collaborative convergence'. Both are valid change management approaches and both have limitations.

It can be difficult to gain buy-in and fidelity of implementation with centralised decision making; but it can be more time intensive to achieve convergence through collaboration. We see MATs taking different approaches depending on the area and type of decision. For example, the trust may require all schools to report termly assessments into one centrally selected data management system, while it might ask Heads of Department to converge on a common maths curriculum.

MAT leaders and trust boards need to be clear about where they want to set a MAT-wide approach and where they are happy for other leaders in the trust to take decisions. This should reflect who is accountable for the consequences of these decisions and must be captured in the scheme of delegation.

The scheme of delegation is a critical document which should state clearly where decisions are made and what delegated authorities schools have.

Collaborative approaches to decision making can reach break points with growth. Once a common approach is defined, new schools or leaders joining the trust will not have been part of the same collaborative decision-making process, so it cannot be relied on to drive long term buy-in. Growth can also create new tiers of leadership, altering who makes some decisions.

Break Points

A break point is a point of non-incremental change where a MAT has to break with a previous strategic or operational approach and make a shift.

Break points are often associated with a change in the scale of the MAT, but we found that they can also be associated with a change in geography, policy context and the type or performance of schools in the MAT. Over the following pages we have highlighted some of the key break points identified by the CEOs involved in our research.

Ambition Perspective

Your strategy and operating model should not be considered fixed. Instead, they must adapt in response to the scale, geography, and performance of your MAT and the schools within it. We have seen that the best MATs review their strategy and operating model regularly and consider whether it is fit for purpose now and for the future. They adapt in expectation of future break points, rather than changing reactively.

Break points from scaling

Accountability and oversight: When working with a small number of schools, CEOs may feel able to retain oversight through frequent communication and direct monitoring. However, MATs reach a scale of operation where they have to develop tighter monitoring systems and, for example, recruit new education leads to the executive team, in order to retain oversight as the numbers of pupils and size of accountability grows.

Governance: It is never too soon to clarify governance structures. However, governance is never fixed, it must evolve with the growth of the trust. For example, MATs that initially opted for representation of all local governing bodies on the main board have typically found this is impractical at scale. Trustees also need to have the interests of all schools in the MAT at heart, not just their original school. All MATs, even the smallest, need to expand the professional expertise and skills mix on their boards to reflect the scale of the MAT and the accompanying accountability.

“We’ve now taken away all local governing bodies. We’ve re-branded them to advisory boards to make the people aware of what they are responsible for. We changed our scheme of delegation at least three times, so everyone’s clear about their decision-making. It’s found that a lot of governing bodies carried on making the same decisions that they’d already made when they had no power to do those, and, actually, were unsure of their roles. So, we’ve done a lot of training... The governors understand what we actually wanted them to do, what was their role, how would they be best placed and best useful in that area.” (MAT 34)

Achieving alignment: If a MAT has a culture of collaborative convergence, leaders have to decide the approach to take when a new school joins. Will they re-open those areas to debate, leave the school to continue with its previous approach or expect it to align without input? What are the risks of each approach? This choice becomes particularly challenging when the new school is high-performing.

Communications: MATs operating at a smaller scale can often achieve consistent communication and build a shared identity by bringing together staff from all the schools for trust-wide activities. As the MAT grows, the challenge for the CEO is to keep messages consistent and frequent even if they don't see staff that often. As numbers grow too large for staff to meet as a single group, trust leaders have to identify alternative strategies for sustaining cohesion.

“We do start every year with one massive, great big Trust-wide INSET. Well, you know, up until this year, that was possible, but, this year, we couldn't do that, simply because we couldn't fit anybody in any given space. There was no space big enough to take us... so we sort of broke those visits down to individual school level, but it's how you retain the identity and cohesion of the Trust, when you're getting that bit bigger, I think, is one thing that we obviously have to think about.” (MAT 32)

The role of the CEO: As the MAT grows, CEOs naturally need to consider where they have expertise, where they can add greatest value and where they should therefore spend their time. Similarly, CEOs should think about their executive team and their capacity and capability, including how to recruit for expertise that complements their own. CEOs will need to adapt their role in school improvement as the trust grows. Many step away from 'on the ground' roles by appointing leaders with the capacity to directly support school improvement, but will remain closely engaged with this core function by playing a quality assurance, challenge and support role.

Break points from geography

Curriculum: Some MATs believe curriculum needs to reflect the local context. They can feel that a common curriculum becomes inappropriate if they take on schools in very different localities. Other MATs strive for a common curriculum. For them, the challenge is operational: how to develop that curriculum collaboratively across geographies, as described below.

Collaboration: MATs may aspire to improve practice within the trust by bringing all their leaders and teachers together to collaborate. However, moving into new geographies makes this more challenging as it increases the time and expense involved. MATs therefore have to review how they create collaborative groups within their structure, and many use cluster-based models to facilitate more regular, local collaboration.

Central operations: Although MATs may initially focus on centralising back office functions to a single location, some then find it necessary to regionalise their operations as their geographic spread increases.

Break points from performance

Pushing for excellence: MATs operating a highly-aligned model can find that high-performing schools face a ‘glass ceiling’ where they want to break away from that model to innovate and drive further improvement.

Tackling underperformance: MATs operating a highly-autonomous model can find schools with low performance face a ‘glass floor’ where a more directive approach is needed and standards and ways of doing things have to be imposed until performance improves. MATs rely on a clear scheme of delegation to empower them to take a more directive approach with under-performing schools and on effective change management to bring schools into alignment when they have become used to a looser model.

In Cluster 2 MATs, which focus on alignment, underperformance can still require targeted school improvement resources to be deployed to provide additional capacity.

Figure 3: Performance break points

| | | | |
|--------------------------------|---|---|---|
| Level of alignment | You will find the same pedagogy and/or curriculum in every school. | We have common principles or values (e.g. of an inquiry-based curriculum) but each school will deliver it differently. | Each school has their own curriculum and/or pedagogy, but we expect to see quality. |
| Performance break point | There can be a ceiling to an aligned approach where it’s hard for a school to continue developing and improving while adhering to a common model. | Where outcomes are poor, or fall, MATs find they need to impose an approach from the centre or through requiring increased alignment. | |

Earned autonomy: Some MATs talk about schools having ‘earned autonomy’ – where a school’s high-performance means it no longer has to stick to the MAT’s school improvement approach. For Cluster 2 MATs that pursue alignment, schools gain ‘earned autonomy’ when they perform well enough to step away from a common approach and to innovate. For Cluster 1 MATs that pursue autonomy, the notion of ‘earned autonomy’ can be a way to justify why lower performers are not given the freedom to pursue their own approach – you earn autonomy once your results are high enough. Some CEOs also use this approach to encourage higher performing schools to join their MAT.

“...if things are going really, really well we won’t intervene but if outcomes are lower then we will be in there” (MAT 10)

Ambition Perspective

Multiple MATs use the term 'earned autonomy' but it means different things depending on their strategy and starting point.

MAT CEOs that decide to use 'earned autonomy' need to bear three things in mind: firstly, CEOs need to consider the message it sends about cohesion and alignment to schools in the MAT which do not have earned autonomy; secondly, schools with earned autonomy still need to be willing and able to contribute to MAT-wide collaboration and school-to-school support; and thirdly, there needs to be regular performance reviews and clarity on the conditions under which the MAT would intervene to remove earned autonomy for weak school performance.

Operational models for delivering school improvement

The research identified different ways that MATs can operationalise their school improvement strategies.

MATs may draw on these approaches due to their strategic intentions or in response to more practical constraints. For example, a MAT may identify a school in a new area to take on, in line with its mission. In the long term its strategy would be to build a cluster around this school, incorporating schools of different phases and with different levels of performance. However, the practical reality is that it takes time to build a cluster, so in the short term the MAT uses consultants to ensure that school has the support and expertise it needs in order to improve.

The models are not mutually exclusive. For example, a MAT might use some consultants alongside in-house expertise.

“Currently we are having to buy in additional support. And we do that at Trust level to support each school, but we have just been designated as a teaching school so we think in a year’s time we will be brokering that support through the Teaching School Alliance rather than having to do that in a ‘buying in an external’ way...”
(MAT 39)

Ambition Perspective

The most important part of a MAT’s top-slice from schools’ budgets is the proportion spent on school improvement. Defining a clear operational model for delivering school improvement is critical for efficiency and efficacy.

MAT CEOs should start with a clear model which can scale in line with their MAT strategy. All models will eventually reach break points which require an investment in capacity or a switch to a new model. For example, a trust may have a hub or consultancy model until it gets large enough to have centrally employed school improvement staff.

Based on our experience of high-performing MATs, we believe it is particularly important that the model enables schools to align around a common approach to curriculum, assessment, teacher training and development.

We believe that defining your school improvement model early and allowing this to drive your growth is the most sustainable long-term approach.

Figure 4: Operational models for delivering school improvement

Hub model

- A high-performing school or leader drives improvement and supports others. This expertise is often sent out to a cluster of schools to help them improve.
- This approach is often adopted when a MAT has grown organically from an initial high-performing school.

Centralised consultants

- The MAT employs consultants who can support schools in the network. These are often ex-heads.
- This approach is often adopted when networks grow and hub models become difficult to sustain or greater expertise is needed.

In-house central expertise

- The MAT employs a dedicated school improvement lead or team. In many cases this is a member of the core senior leadership team. In some MATs this in-house team is large (over ten individuals). In other cases this expertise is drawn from the best leaders in the Hub model.
- This shift often happens once MATs can afford it, when they can direct resources from stronger to weaker schools, and when they become dissatisfied with consultants.

Cluster-based model

- Distinct geographic hubs are established with school improvement activity taking place across sub-networks of schools, perhaps led by a regional training school.
- This approach is often a response to further expansion and/or geographic dispersion.

Self-improving network

- MATs share expertise and use peer-to-peer support to deliver school improvement where needed. This can be directed from the centre in response to underperformance/identified areas for improvement, or in a more collaborative and less directed way.
- This approach tends to be adopted (or be an aspiration) once a critical mass of good practice is achieved.

Ambition's conclusions

MATs are complex organisations, so their effectiveness depends on the quality of leadership from the CEO, leadership team and board of trustees. Our research did not identify a single strategy or set of operational decisions associated with high-performance; different MATs can achieve their vision in different ways depending on their culture and their beliefs about the best way to deliver school improvement.

Ambition's view is that the highest performing MATs are differentiated by having a coherent approach which aligns their vision and mission, their school improvement strategy and operating model.

Our research suggests that the highest performing MATs have a clear and specific vision, with pupil outcomes at its core. In line with Impetus-PEF's Driving Impact approach, we believe a MAT's leadership team and board of trustees must decide two key things when shaping their vision and mission: the mix of schools they want within their MAT and the pupil outcomes they value.

An effective school improvement strategy sits at the core of any MAT. It should be defined early and should drive the MAT's plan for growth. A CEO must know how being part of the MAT will enable schools to deliver better outcomes for their pupils than they would if working independently. A MAT CEO is ultimately accountable for the performance of all the trust's schools and recognising this can be a catalyst for deciding how the MAT will drive improvement.

Our research identified two dominant strategic approaches amongst MATs: preserving the autonomy of individual schools and their leaders to drive improvement; or achieving consistent teaching and pedagogy across schools.

MAT leaders that choose to pursue consistency will need to achieve alignment across their schools. They have to make a cultural choice about whether to achieve this through central direction or collaborative convergence. It also needs to be clear which level of leadership is responsible for taking decisions about alignment in each area. This should reflect who is accountable for the consequences of the decisions and should be captured in a scheme of delegation.

Ambition believes the highest-performing MATs have focused on aligning their schools around a common model of school improvement. In the MATs where we see this happening a common approach is usually developed around curriculum, assessment and teacher training and development.

A MAT's operating model should be designed to support its school improvement strategy but it should not be considered fixed. Our research highlighted how a MAT's strategy and operating model can face break points where a previous way of working is no longer fit for purpose. This can happen with a change in the scale of the trust, but importantly can also happen with a change in geography, political context or school performance.

A MAT must continually review its strategy and operating model and adapt it in advance of potential break points. This is essential to achieve sustainable growth and sustained performance in the outcomes that matter most: **transforming the life chances of children, especially our most disadvantaged.**

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This research investigates how a MAT's vision translates into its strategy and operating model, and how these are affected by MAT development.

After engaging with over 40 CEOs and surveying the staff from 22 trusts, the report explores the strategic choices taken by leaders, how this affects the way their trusts operate and how changes in the scale, geography and school performance of a MAT can create break points that mean a trust has to change its approach.

Executive Educators: Building and leading a sustainable MAT. This research will inform the development of our executive leadership programme for CEOs. Executive Educators equips participants with the advanced knowledge and skills to implement and sustain change across a multi-academy trust (MAT) or group of schools. Visit our website for more details.

LKMco work across the education, youth and policy sectors. They help organisations develop and evaluate projects for young people, carry out academic and policy research and campaign about the issues that matter.

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