A constant dance: a study of values-based leadership in Multi-Academy Trusts

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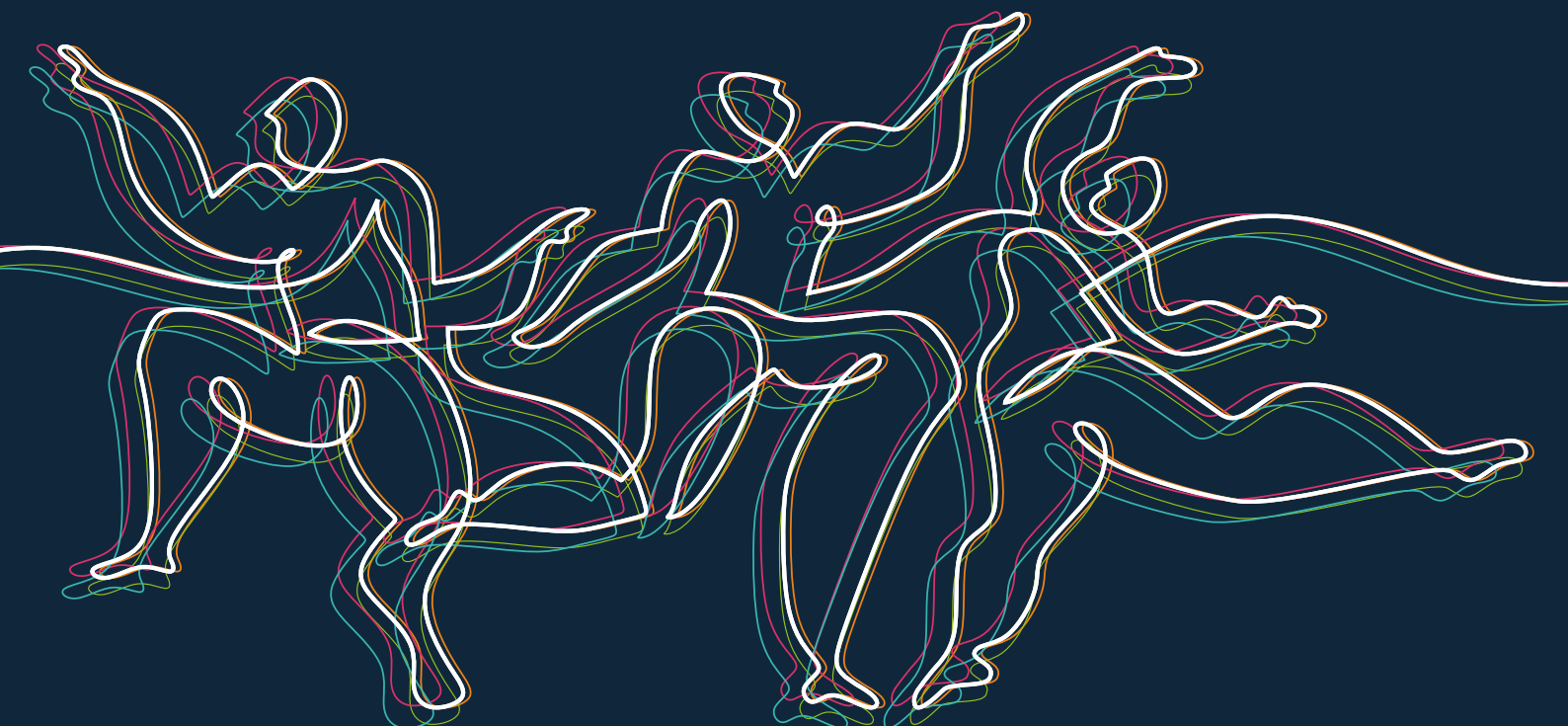
Acknowledgements

Working with the Whole Education MAT Leaders Network over the past two years has been one of the most rewarding aspects of our roles – and we (mostly) enjoy our jobs! We think it has worked so well because, although the trusts involved are all very different, they are all committed to a 'whole education' ethos. Furthermore, they are all open and honest about the challenges they face, the progress they are making, and the benefits of coming together to reflect and learn – or, as we call it here, to sensemake. We are grateful to the leaders of these trusts for letting us in and for working with us to shape the four 'knotty' areas that we explore in this report.

Within the wider group, we are particularly grateful to colleagues in the five trusts that we focus on in this report – Anglian, LiFE, Meridian, Pioneer and White Woods – who gave us their time, insights and honest reflections.

Of course, none of this would have happened without the core Whole Education team - particularly Shonogh, Douglas and Verity. We are grateful for their collaborative spirit and thoughtful engagement at every stage.

Finally, we are grateful to various colleagues at the University of Nottingham who provided the funding (via HEIF/ESRC) and supported the research at different stages.

Toby Greany
Eleanor Bernardes
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Foreword

I t is common to hear metaphor used to describe the experience of leadership. It is perhaps unsurprising then, that in their interviews with leaders of trusts, Toby Greany and Eleanor Bernardes would be told that leadership of a multi academy trust is 'a constant dance'. This metaphor is particularly evocative in helping us to explore the leadership of organisations that, in just over a decade, have become the dominant model of school governance in England.

In this research Toby and Eleanor bring together the voices of leaders from five trusts who are part of the Whole Education Trust Network. While some of the leaders have been involved with our work for many years, others are relatively new to the network. All have an unwavering commitment to a 'whole education' and perform the constant dance of values-based leadership in their pursuit of this. When reading the case studies that describe each trust and their journey, obvious similarities in underpinning principles, experiences and sometimes in approaches become apparent but there are also noticeable differences. Often these differences are the intentional outcomes of principled decisions, sometimes they are the unintended consequences that emerge. What is particularly refreshing is the honesty and humility with which the leaders describe their experiences and the constant tensions that are at play.

In a group dance, there are times when all dancers know their part and have the skill to perform it, they are aligned, moving as one. The most beautiful synergy emerges. But dancing with others is not easy. It takes hours of practice to produce a seamless performance because there are so many moving parts. An individual action, a loss of balance or a slight loss of timing can lead to disequilibrium and discord. The moment passes, the tension shifts, the focus returns. The constant dance. How similar to the experience of leadership of a complex, multi-site organisation?

At Whole Education we have been on a mission to grow networks of confident and capable leaders who build schools that provide a 'whole education' for close to 15 years. We are convinced that our education system needs leaders who are comfortable with complexity and can foster the climate and conditions where all leaders feel capable of performing their role in the constant dance.

The work that we have been able to do in partnership with Toby and Eleanor over the past two years has undoubtedly led the leaders in our trust network to feel that they have powerful models and processes to support this work. The opportunity to engage in ongoing conversations and to think deeply and critically together has enabled sustainable changes to emerge. Each one of the trusts involved in the network has spoken of the influence of this work on their approaches to MAT organisational development and the significant number who have engaged in ongoing action learning are constantly inspired and challenged by the questions and observations of Toby and Eleanor but equally by the shared investment in their success from the other trust leaders in the group. The dance will never be over and is always enhanced by new dancers. It would be great to welcome you to be part of it.

Shonogh Pilgrim,
CEO, Whole Education
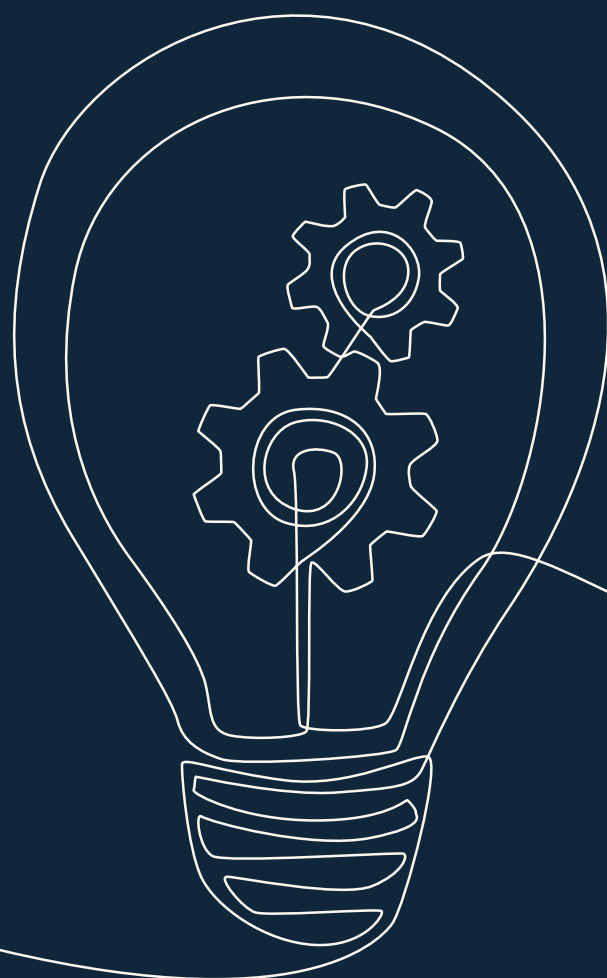
Executive Summary

This research explores how leaders in five Multi-Academy Trusts (MATs) are working to develop their organisations in ways which enhance their ability to deliver a 'whole education' for both staff and students. The "constant dance" reflects how leaders must work to balance and address different priorities, such as efficiency, effectiveness, relationships, growth, ownership and the contextual diversity of schools.

The five case study trusts - Anglian, LiFE, Meridian, Pioneer and White Woods - are all members of the Whole Education MAT leadership network. We interviewed 40 staff in total, including CEOs, leaders from trust central teams, headteachers, and staff working in schools.

The research investigated four 'knotty' areas for trust organisational development - sensemaking and leadership, structural integration, knowledge mobilisation and boundary spanning, and navigating agency, autonomy and prescription. These are shown in Figure 1, illustrating how they overlap, with navigating agency, autonomy and prescription as a continuous central theme.

Figure 1: Values-based Multi-Academy Trust leadership and organisational development for 'whole education'

Sensemaking & leadership

Navigating agency, autonomy and prescription

Structural integration

Knowledge mobilisation & boundary spanning
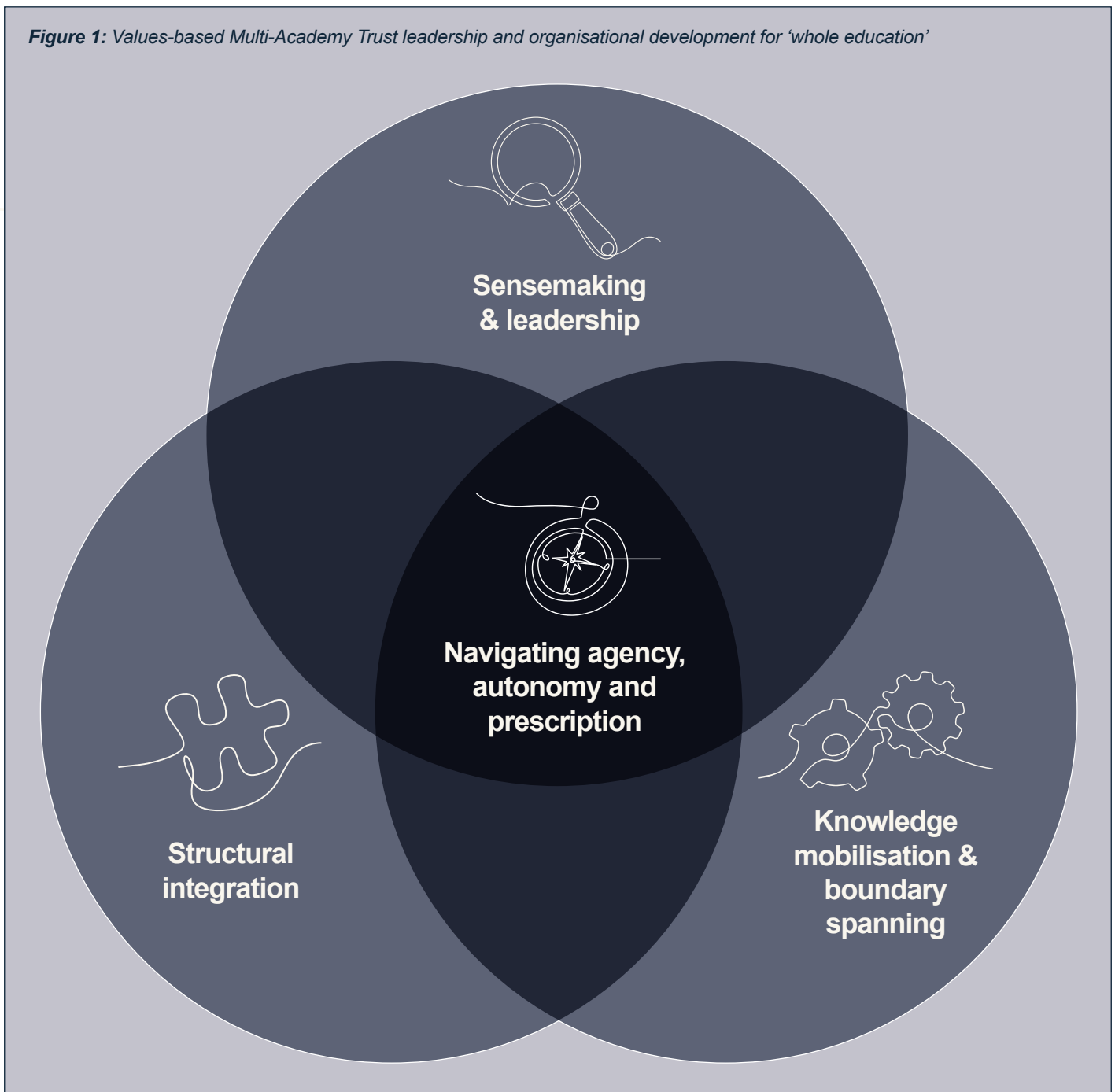
Executive Summary

What does 'whole education' mean for trusts and schools?

Interviewees identified three aspects: i) valuing a broad range of outcomes: providing a range of opportunities and experiences that include, but go beyond, academic attainment; ii) a commitment to social justice: equity, inclusion and belonging; iii) staff growth and well-being: meaning that a 'whole education' is about staff as well as children.

Sensemaking and leadership:

In all five trusts key decisions and approaches were frequently debated, revisited and evolved by groups of staff (and, often, trustees) as they reflected on data and experience.

We focus on two examples of sensemaking:
• **At LiFE**, a 'skunk works' group of 12 staff was charged with developing a new approach to the primary and secondary curriculum, involving interdisciplinary learning and an engagement with real world challenges. The Real LiFE curriculum has been piloted and developed across the trust since 2021.

• **At Pioneer**, a diverse group of staff worked together to develop the Pioneering Leadership Programme, centred on three elements: Heat experiences, Colliding perspectives, and Elevated sensemaking. The programme is open to all staff and around 200 have completed it so far, across 15 cohorts.

These examples demonstrate innovative organisational responses, but sensemaking in the five trusts was generally more 'everyday' (i.e. incremental and ongoing) reflecting a level of curiosity and openness to different perspectives. The examples illustrate how trusts can:

• Recognise and respond to ambiguity – taking time to engage in extended collective sensemaking and organisational learning in relation to core areas of practice and organisational development (even in the context of busy school and trust life)

• Unlock distributed leadership and draw on wider perspectives by asking diverse staff to collaborate to shape meaningful change.

Structural integration
Existing research has identified three options for structural integration: appointing a central team, relying on school-to-school support, or giving schools (earned) autonomy. Most trusts have centralised most back-office functions (e.g. finance and HR), with school improvement capacity also likely to rely on central teams, although these trends are not uniform.

We focus on two examples - White Woods (14 primary schools) and Meridian (30 schools – primary, secondary and special). Leaders in both trusts expressed similar beliefs about the rationale for integration: that centralisation of core functions ("taking away the operational noise") enables headteachers to focus on "the important stuff".

Both trusts have centralised many functions, in particular across the back office, and both can evidence benefits from this in terms of efficiency, effectiveness and organisational coherence. School-based leaders largely welcome these developments where they reduce administrative loads and are responsive to the specific needs and contexts of individual schools.

However, both trusts recognise that centralisation is not always optimal. Indeed, in recent years, Meridian has moved away from its fully centralised model to a hybrid approach in which central staff are located in schools and area teams. The trust's COO/CFO reflected that this might not be the most efficient approach, but was worthwhile because it supported relationships, responsiveness and belonging in pursuit of 'whole education'.

Knowledge mobilisation and boundary spanning

A core argument for MATs is that they can facilitate the sharing of knowledge, expertise and practice across member schools and staff, thereby enhancing professional development and building collective capacity for improvement.

Boundary spanners are key individuals who work across different parts of a trust (e.g. in schools and the central team) or who provide a bridge to wider knowledge and expertise beyond the trust (e.g. working part-time in a subject hub), and who can thereby help to translate and apply ideas across different contexts.

We focus on three examples:
• **White Woods:** Work on structural integration – such as adopting shared data systems – was an important platform for knowledge mobilisation. Beyond this, the CEO has worked to develop a culture of curiosity and challenge, for example by talking about and sharing research, and has introduced a leadership structure which expects all headteachers to contribute at least five days a year to cross-trust work, as boundary spanners.

- **LiFE:** Members of the 'skunk works' team which developed the Real LiFE curriculum have acted as informal boundary spanners as the new curriculum has been introduced across schools. Different schools have adopted different approaches, so the trust has drawn on this learning to create shared resources and assessment rubrics.

- **Anglian** has co-designed a set of blueprints which serve to codify and consolidate knowledge. Subject networks provide a key mechanism for knowledge mobilisation, though it remains challenging to sustain engagement in these as the trust has grown.

A key message is that knowledge mobilisation cannot be seen as a stand-alone activity. Rather, it is a constant and evolving set of processes, involving both knowledge creation and knowledge sharing. These processes are bound up with approaches to sensemaking, structural integration and navigating agency, autonomy and prescription in each trust.

Navigating agency, autonomy and prescription

This was by far the 'knottiest' area for trusts. MATs must exert some level of hierarchical control over schools, both to fulfil their legal and financial obligations and because, done well, centralisation can offer increased coherence, efficiency and effectiveness. However, centralisation can also create silos, restrict relationships, become bureaucratic, and reduce local ownership. Getting the balance right between "top-down uniformity and bottom-up individualism" was seen as critical for unlocking teachers' agency. Yet too often MATs are seen as overly tight and coercive, even if this is done with good intentions, such as reducing workload. At root these issues relate to core values, cultures, identities and beliefs about the purpose of schooling and the nature of professionalism in a highly accountable and outcomes focussed system. Nevertheless, at an operational level, trust leaders must decide whether, when and how to: a) standardise and prescribe; b) facilitate collaborative alignment; and/or c) encourage autonomy and organic development.

We focus on two contrasting examples:
- **Anglian:** the trust was founded on a commitment to school autonomy but has, over time, developed a strong central back office. It has also gone through a "hard won" process of alignment on wider areas of school improvement, although it remains a relatively decentralised trust, with no executive heads or curriculum leads in its central team. The process of defining core values and co-designing blueprints

has helped to develop "shared language" and ways of working. The headteachers we interviewed were clear they had autonomy, though we also heard that democratic decision-making could be "inefficient."

- **Meridian:** The trust has been "quite prescriptive" since it first formed. The trust's values provide a bedrock for decision-making and practice, overseen by a core team of executive heads and subject leads. Established leaders describe a process of convergence in policy and practice over a 10-year period, as the trust has learned "what works" and has co-designed shared frameworks and tools. These tools seek to provide tight-but-loose parameters which allow scope for agency. The school leaders we interviewed were positive about this approach and it was clear that relationships were strong, although one head was honest about the challenges of assimilating to this model when they first joined.

Our research across all five trusts revealed that the relationships between structure and agency are highly nuanced. While there might be an assumption that prescription will always reduce agency and that autonomy will always unlock it, our findings suggest that trusts must work to develop "enabling constraints" which encourage "agency within a framework".

Becoming reliably adaptive: a constant dance

This research – although small-scale – helps to show that there is not one best way to lead a MAT. Rather, we conclude that trusts must strive to be reliably adaptive.

Values-based leaders must always engage in a "constant dance", accepting that their trust will never be perfect – not least because the world is continually changing around them – but can always learn to improve. This requires a focus on:

- **Shared values**: including, in these trusts, a commitment to 'whole education' for all children and staff

- **Sensemaking:** acknowledging ambiguity and drawing diverse stakeholders together to reflect on collective experience and explore possibilities for new ways of working

- **Co-construction** as a core and continuing process

- **Epistemic communities:** leaders were skilled at working with colleagues to articulate shared theories, language and tools as a basis for collaboration between staff and schools.

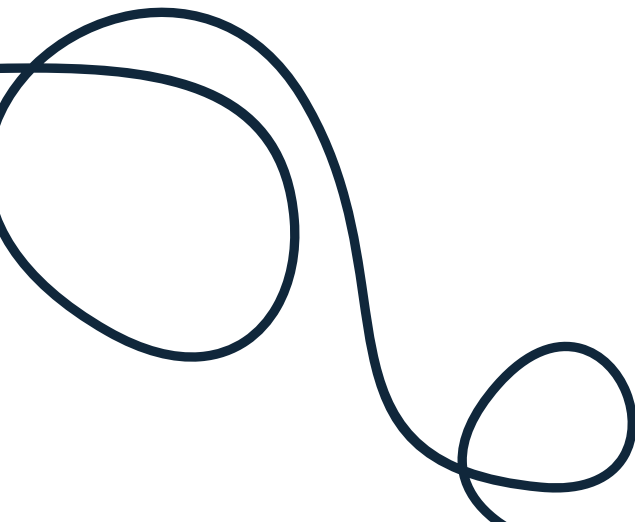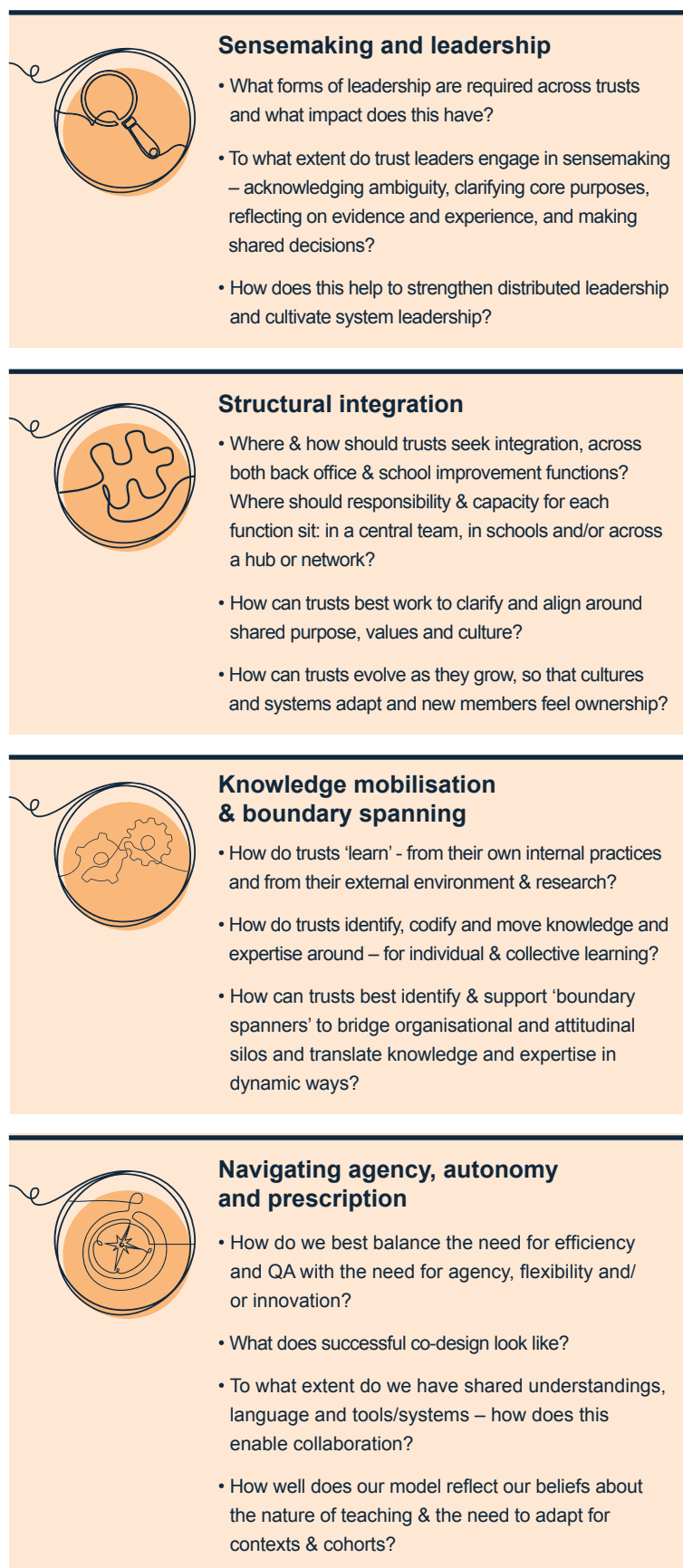# Four 'knotty' areas for MAT organisational development

01

This research explores how leaders in five Multi-Academy Trusts (MATs) are working to develop their organisations in ways which enhance their ability to deliver a 'whole education' for both staff and students. The need for the research emerged from a network involving Toby Greany and members of the Whole Education MAT leadership network over a period of two years (2022-24). During that time the network comprised 20 trusts, all of which were committed to a 'whole education' ethos. A range of senior leaders from the trusts attended various network events organised by Whole Education, including: peer learning and exchange visits; conferences; workshops; and action learning sessions. During several of these sessions Toby shared and discussed his own and wider research into MAT leadership and organisational development, which we summarise in the following section. Through the ensuing discussions, the participants worked together to identify the four areas shown in Figure 2 as particularly 'knotty' but important for organisational development.

According to the MAT leaders who identified these issues, they are important for successful organisational development, but hard to resolve. This knottiness reflects several features:

• **first,** decision-making in these areas is inherently values-based, with implications for organisational cultures as well as systems, processes and practices

• **second,** there is no clear consensus or evidence-base on 'best practice' in these areas

• **third,** any course of action in these areas is likely to involve trade-offs and (often) unintended consequences.

Importantly, we are not suggesting that these issues span the full range of areas that MAT leaders need to address (for example, there is nothing here specifically on 'school improvement'). Rather, we argue that they are significant but often under-appreciated in discussions of trust quality, growth, efficiency, effectiveness and improvement.

Figure 2: Four 'knotty' areas for MAT leadership and organisational development

Sensemaking and leadership

• What forms of leadership are required across trusts and what impact does this have?

• To what extent do trust leaders engage in sensemaking – acknowledging ambiguity, clarifying core purposes, reflecting on evidence and experience, and making shared decisions?

• How does this help to strengthen distributed leadership and cultivate system leadership?

Structural integration

• Where & how should trusts seek integration, across both back office & school improvement functions? Where should responsibility & capacity for each function sit: in a central team, in schools and/or across a hub or network?

• How can trusts best work to clarify and align around shared purpose, values and culture?

• How can trusts evolve as they grow, so that cultures and systems adapt and new members feel ownership?

Knowledge mobilisation & boundary spanning

• How do trusts 'learn' - from their own internal practices and from their external environment & research?

• How do trusts identify, codify and move knowledge and expertise around – for individual & collective learning?

• How can trusts best identify & support 'boundary spanners' to bridge organisational and attitudinal silos and translate knowledge and expertise in dynamic ways?

Navigating agency, autonomy and prescription

• How do we best balance the need for efficiency and QA with the need for agency, flexibility and/or innovation?

• What does successful co-design look like?

• To what extent do we have shared understandings, language and tools/systems – how does this enable collaboration?

• How well does our model reflect our beliefs about the nature of teaching & the need to adapt for contexts & cohorts?

About the research

02

This report is based on case study visits to five trusts involved in the Whole Education network. It illustrates and analyses some of the different ways they are addressing the 'knotty' issues. The case study trusts were selected in consultation with Whole Education, with data collection taking place in summer 2024.[1] Each trust was visited by both researchers, with some follow-up interviews taking place online. During each visit a variety of one to one, paired and group interviews took place with key personnel who were selected by the trusts on the basis that they could give an informed perspective on organisational development and leadership issues. In total we interviewed 40 staff, including: trust CEOs (n=5); central team executive leaders (n=16 – with roles including Deputy CEO, Chief Operating Officer, Director of HR, Director of Education/School Improvement, Executive Head); headteachers (n=11); and senior and middle leaders from individual schools (n=8). These interviews mostly took place in trust schools or, in one case, at an off-site conference venue. In some trusts we had additional opportunities to observe staff events and meetings. We also reviewed relevant documents provided by the trusts, such as strategic development plans, organisational blueprints and organograms, as well as nationally available data.

Table 1 outlines key features of the five trusts. It shows that the sample included trusts across different geographic areas, of different sizes, and with different compositions in terms of the phase, focus and performance profile of member schools. However, the trusts are not intended to be representative of all trusts nationally; indeed, the fact that they choose to be members of the Whole Education network indicates their distinctiveness.

Table 1: Profile of the five trusts

	Anglian	LiFE	Meridian	Pioneer	White Woods
Year formed	2011	2012	2011	2010	2013
Number and phase of schools	16 6 x Secondary 10 x Primary	10 6 x Secondary 4 x Primary	30 13 x Secondary 14 x Primary 3 x Special	4 2 x Secondary 1 x Primary 1 x Middle	14 All Primary
Number of pupils	8,045	8,096	16,157	2,765	3,337
Region/Local Authority areas	Cambridgeshire, Essex, Suffolk	Leicestershire	Bedford, Cambridgeshire, Peterborough, Lincolnshire, Central Beds, Northamptonshire	Slough, Windsor, Maidenhead	Rotherham
Profile of schools	6% Outstanding 69% Good 12% RI 13% No data	70% Good 10% RI 20% No data	3% Outstanding 63% Good 16% RI 16% No data	25% Outstanding 75% Good	7% Outstanding 78% Good 14% RI

Existing research on MAT leadership and organisational development
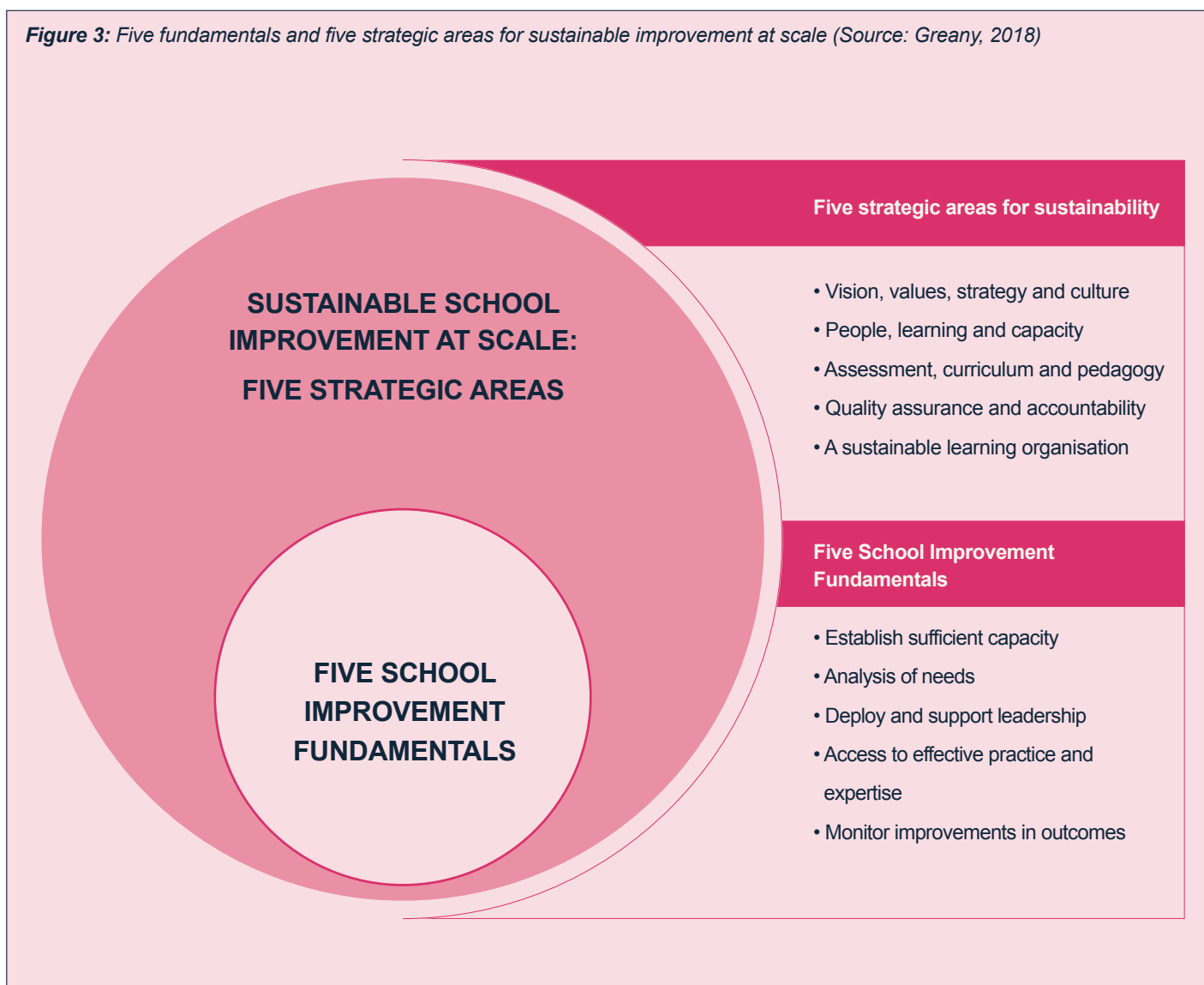
03

This section provides a brief overview of the research that Professor Toby Greany shared and discussed with the network and which underpinned the identification of the 'knotty' issues. His inputs were informed by his reading of the wider evidence base on MATs but focussed mainly on two large-scale studies he led together with his subsequent work with academics in the US and UK to conceptualise leadership and organisational development in multi-school groups.[2]

Evidence that MATs make a positive difference to student outcomes remains inconclusive. 'Multi-academy Trusts: do they make a difference to pupil outcomes?' is the only research in this area to use a rigorous quasi-experimental design: it found that, overall, pupils in schools in MATs do not perform significantly better than their peers in standalone academies or LA maintained schools. In addition, the study explored impact by size of MAT: while pupils in small and mid-sized MATs tend to perform better

than their peers in non-MAT schools, pupils in large MATs (16+ schools) tend to perform worse.

There is no 'one best way' to lead trusts, not least because MATs differ significantly in terms of their size and composition (for example, in terms of the phase, ethos, contexts and performance profile of member schools). The 'Sustainable Improvement in Multi-School Groups' study conducted on behalf of the Department for Education included 23 case studies of below and above average performing trusts but found no clear evidence that leaders in higher performing trusts work in consistent ways which might explain their performance. Instead, the findings indicate that sustainable improvement requires trust leaders to achieve a dynamic balance between five school improvement fundamentals (required for intensive turnaround in struggling schools) and five strategic areas (required for broader organisational development), as shown in Figure 3, below.

Figure 3: *Five fundamentals and five strategic areas for sustainable improvement at scale (Source: Greany, 2018)*

SUSTAINABLE SCHOOL IMPROVEMENT AT SCALE:

FIVE STRATEGIC AREAS

FIVE SCHOOL IMPROVEMENT FUNDAMENTALS

Five strategic areas for sustainability

- Vision, values, strategy and culture
- People, learning and capacity
- Assessment, curriculum and pedagogy
- Quality assurance and accountability
- A sustainable learning organisation

Five School Improvement Fundamentals

- Establish sufficient capacity
- Analysis of needs
- Deploy and support leadership
- Access to effective practice and expertise
- Monitor improvements in outcomes

Existing research on MAT leadership and organisational development (Cont.)

The 'Structural integration and knowledge exchange in Multi-Academy Trusts' article presented a further analysis of the 23 case studies, focussing on trust growth and informed by the wider literature on mergers and acquisitions. It identified a small number of core areas which shape MAT cultures and ways of working - in particular, the approach to leadership decision-making, decisions on structural integration, and how practice is shared - and argued that certain patterns could be identified, for example:

> *MATs that were focussed on securing high-levels of standardisation in all areas tended to have a relatively narrow, performance-driven focus, a directive decision-making approach, a centralised structure and a roll-out approach to replicating practice. By contrast, the MATs that were seeking to develop alignment across schools tended to adopt more a consensual and transparent approach to decision-making and to rely on co-design or organic approaches to replicating practices.*
> **(Greany and McGinity, 2021, p324)**

The chapter written with three US academics extended the focus on knowledge exchange, by asking 'How do three 'middle tier organisations' work to develop, share, and use practical knowledge as they grow?' The chapter focussed on three case studies: Shelby County iZone (a group of 23 public schools in deprived areas of Memphis, Tennessee), Upward Affinity Organisation (a network of 20 public schools in New York City), and Regional MAT (a trust of 12 schools in challenging contexts). Drawing on the literature, in particular work on epistemic communities, the chapter sets out five dimensions which appear integral to the generation and use of knowledge across middle tier organisations:

> *(1) a shared conceptual framework that enables organizational members to collectively make sense of experience and outcomes in ways that generate common insights and knowledge; (2) common routines and tools that tie practitioners into a singular technical culture and problem-solving system; (3) boundary spanning roles and structures that facilitate the transfer of knowledge across internal organizational boundaries; (4) shared sensemaking structures that enable practitioners to collectively puzzle over outcomes, share experiences, and interpret data; and (5) a measurement system by which performance and outcomes can be evaluated in agreed-upon ways, informing further improvements to the other four dimensions.* **(Glazer et al, 2022, p166)**

The chapter uses these five dimensions to analyse the three case studies, showing how their theories of action evolve in response to both the demands of growth and scale and the need to adapt to ever changing external environments. For example, whereas Regional MAT starts with just three schools and can rely on hands on support from the high-performing founding school, this model proves inadequate once it has 12 schools and the founding school is downgraded by Ofsted. Instead, the trust appoints executive heads across schools and develops subject networks to enable boundary spanning. It also adopts common exam boards (shared tools) and assessment cycles (shared routines) as a platform for cross-trust collaboration at scale. Meanwhile, the external environment continues to change, for example with increasing government regulation of trusts, meaning that MAT leaders must respond and adapt.

Finally, the article on 'Structural integration and knowledge exchange in Multi-Academy Trusts' set out a typology of MATs based on four dimensions:

1. **Purpose:** are the vision and values distinctive, meaningful and embedded?

2. **Performance:** is there a clear and sustainable focus on enabling staff and pupils to learn and improve?

3. **People**: who makes significant decisions and how far are key stakeholders involved?

4. **Process:** is the operating model clear, flexible and effective in securing continuous improvement at all levels?

It argued that all four dimensions are important and that they are not mutually exclusive, but that the 23 case study trusts tended to have dominant preferences: for example, one trust might emphasise its purpose (such as a faith ethos, a distinctive curriculum philosophy, or a fierce commitment to working in deprived contexts), whereas another might prioritise performance (for example, seeing improvements in Ofsted grades – and, often, growth - as its primary purpose/s). The article identified four metaphors for MATs that fall in the different quadrants shown in Figure 4, opposite, reflecting their dominant preferences in relation to purpose, performance, people and process.[3] The point of the table shown in Figure 4 is to indicate that all four approaches might be seen to have pros and cons. For example, while founding staff in 'family' MATs might feel a strong emotional commitment to the purpose and, often, the founding CEO, this might also feel exclusive or cliquey for staff in new schools that join. Similarly, while a purpose-driven 'community' trust that adopts a relatively flat democratic process for collective decision-making might feel cohesive, it might also feel confusing if no-one really knows how or why decisions are made, and so on.

Figure 4: *Typology of MATs, adapted from Greany & McGinity, 2021*
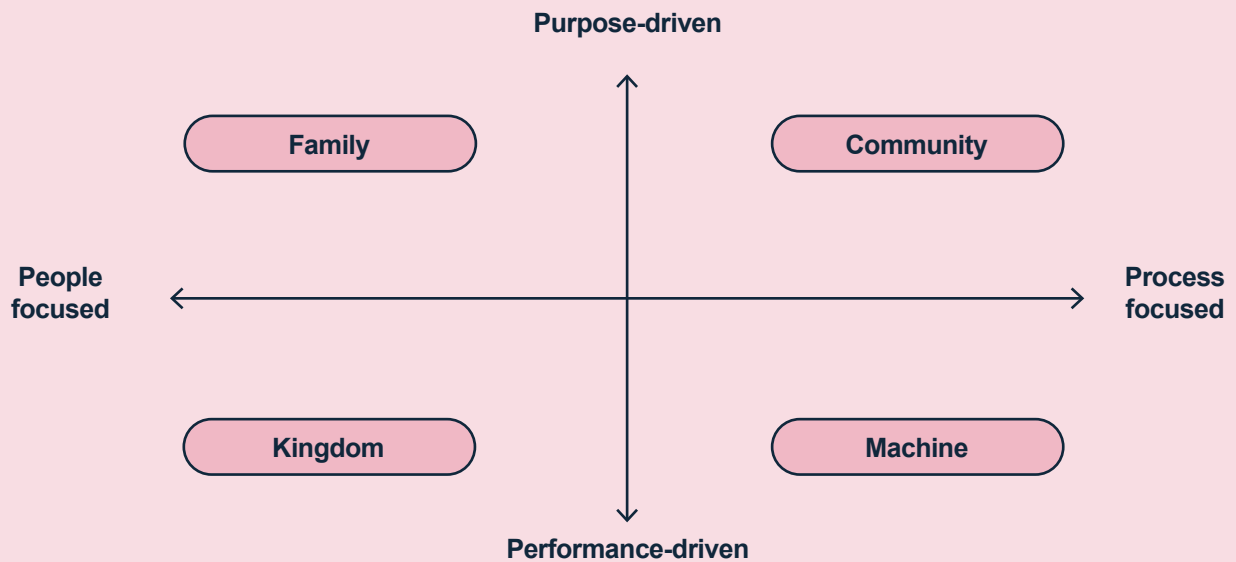
	Org culture	Decision making	Advantages	Disadvantages
Family	Relational	Paternalistic	Commitment	Cliques
Kingdom	Hierarchical	Diktat	Clarity	Coercion
Machine	Transactional	Rule-based	Consistency	Conformity
Community	Professional	Democratic	Cohesion	Confusion

This brief outline of previous research and thinking helps to frame the four 'knotty' areas, although there are also wider influences not covered here. For example:

• **'leadership and sensemaking'** reflects the work on decision-making and leadership, informed by concepts from the organisational theorist Karl Weick[4]

• **'structural integration'** comes mainly from work on mergers and acquisitions, but also reflects the DfE requirement that all trusts must have a CEO and accounting officer;

• **'knowledge mobilisation and boundary spanning'** relates to the thinking on how practice is shared, for example in the chapter on 'middle tier organisations'

• **'navigating agency, autonomy and prescription'** reflects debates around standardisation/alignment/autonomy, epistemic communities and professional cultures.

Critically, while the four knotty areas can be located in relation to this earlier research, they were co-created with leaders involved in the Whole Education workshops and action learning sessions held in 2023-24, so also reflect the priorities and preoccupations of the trust leaders involved, as the questions in Figure 2 indicate.

Introducing the five trusts

Anglian Learning

Anglian consists of 16 schools - 10 primary, six secondary – mostly in Cambridgeshire, but with two in Essex and two in Suffolk.

In 2012 the founding CEO of the trust led the academisation of the school where he was then headteacher – a secondary Village College in Cambridgeshire. He reflects that he "wasn't a massive flag waver for academies" but was driven by "the extra funding that we got" and "the fear that if we didn't do something ourselves and try to take control of our own destiny, we would be left behind."

In 2016, he began working with a group of other "similar minded headteachers" to create Anglian Learning, largely as a way to "protect ourselves". The founding schools were all high performing and right from the start there was a clear vision for the autonomy of headteachers:

A lot of that initial work… was based around high levels of [school] autonomy. And that basically we would probably share things like our cleaning contracts… But please don't tell us that we have to do something similar in terms of curriculum or anything like that.

The CEO formally took on the title in 2018, at which time the trust comprised of four schools. The first growth involved some local primary schools after which the trust took over another MAT, nearly doubling in size. These new schools included both new (i.e. free) schools and some sponsored academies, which were struggling in terms of school improvement capacity and student outcomes. Whereas, until then, there had been little need for a central trust improvement strategy, the addition of struggling schools required a shift in approach. Negotiating new ways of working which balance school autonomy with collective improvement and support for struggling schools remains an ongoing process for the trust. One approach has been to engage staff in mapping and reflecting on the trust's culture, using the typology in Figure 4. Another has been the development of cross-trust 'blueprints', as we outline in section 6.

At the time of the research visit there were plans for further growth. While some of this was planned, the CEO had had enquiries from several primary schools seeking "to find safety in a certain harbour, which is a MAT they like" (CEO). These ad hoc developments presented challenges as the CEO was trying to adopt a coherent approach to growth, only taking on schools in defined geographic areas while leaving other areas and types of school – such as faith schools - to other trusts.

04

LiFE Multi-Academy Trust

LiFE comprises 10 schools - six secondary and four primary – all in Leicestershire.

The CEO became head of the upper school that founded the trust in 2009. Soon afterwards, "Gove-ism turned the system on its head," with particular challenges in Leicestershire, where the LA decided to move from its existing model of middle and upper schools to a two-tier (i.e. primary and secondary) system with very little support or co-ordination. As a result, the upper school needed to transition to an 11-18 intake at the same time as its three feeder middle schools were also transitioning to become 11-16 schools, creating a huge over-supply of places and intense competition for students.

While the school thrived in this new environment, becoming the most oversubscribed school in the area, they did not enjoy this new dynamic. When one of its former feeder schools got into "real trouble" in 2016, they approached the former upper school for help: "[they said] 'can we form a trust?' And we said 'yes', because we never wanted to do damage to anybody else. We just wanted to be able to uphold our ethos" (CEO). The new trust was consciously designed to recognise the individual context of schools, giving headteachers "freedom to innovate within a philosophy" (CEO) and a consistent purpose and set of values.

By 2020 the trust had grown to five schools and the CEO role was created, having previously been Executive Head and Accounting Officer. The CEO describes his current role as "chief troubleshooter", seeking to ensure he has his "feet on the ground" and can name "four or five of the most difficult things that are happening in all of the schools." He used a restaurant metaphor to describe the trust:

> *We aren't the standardisation model of Pizza Express… we are a group of Michelin-starred restaurants working within a philosophy of, you know, sustainable food production… led by great chefs who we are supporting in order for them to really shine… within the design principles that we've set out around what we believe in.*

The trust's founding school had a history of "trying to do things differently", including an innovative curriculum inspired by the work of Ron Berger, Expeditionary Learning, and XP School.[5] As we outline below, this work has evolved into the trust's Real LiFE Curriculum.

Meridian Trust

Meridian oversees 30 schools with a regional footprint around Cambridge and Peterborough. These include an all-through, 12 secondaries, 14 primaries and 3 special schools.

The idea for the trust began in the mid-noughties when the then headteacher of Swavesey Village College (Martin Bacon) entered competitions to open a new all-through, all-inclusive educational campus in a planned new town. An Educational Trust was formed (known at the time as CMAT) to open the schools, although due to the global financial crisis this did not happen until 2019. Originally, the new schools were planned as part of an LA maintained hard federation:

We're not interested in soft federations, we're only interested in hard as we call it. We're getting married, we're not going steady because when it comes down to tough decisions, we should be making decisions about the whole rather than just running off into our little siloes. **(CEO)**

During the delay period, Swavesey became an academy and formed a MAT to support other schools, with three schools joining by 2012. Sadly, Martin Bacon died around that time, when the current CEO (who had previously been Vice Principal at Swavesey) took over. The next school to join was a primary school in special measures, reflecting the commitment to all-through education. The journey of this school joining the trust was built on the personal relationships of the CEO in the local area:

You'll see that in a load of the places where we work. There's so many relationships. So the chair of governors at that primary school was married to a lad who lived opposite my wife when they were kids. And I've known him through primary school myself… it's always been like that. It's through the people that we know and connections and people trusting us and knowing us over a period of time. **(CEO)**

Over the next few years the trust "emerged" through a "gradual evolution." Most recently, the trust has opened three special schools. In 2019 the speed of growth increased dramatically when the CEO was asked to become Interim CEO of a five school trust which was facing significant financial challenges. Meridian ended up taking over the trust, which included several more primary schools "which we had not prepared for." The CEO was also a trustee for a successful local primary trust, CPET, so he proposed a merger as a way of increasing the overall primary capacity:

So, we kind of jump… from around, sort of, 16-17 schools, it suddenly becomes 30 in about five minutes. And I was explaining to the trustees that having added five, the best way to stabilise was to add another five, which might sound a bit bonkers, but if you're identifying the skill set that you need through your merger, go get the skill set that you need to improve, and it's a very clear…it's massively improved our primary sector.

Pioneer Educational Trust

Pioneer is a small but diverse trust consisting of four schools, two in Slough and two in Windsor and Maidenhead: a selective secondary grammar school, a non-selective single-sex (boys) secondary school; a middle school and a primary school.

The current CEO was the deputy head at the founding school (the grammar school), which became an academy in 2011. In 2014 it became a MAT when it sponsored a local primary school in special measures. The middle school joined in 2016, and the other secondary in 2023. When the founding CEO stepped down in 2018, the two deputy CEOs became 'co-CEOs' for five years, but moved to a single CEO model in September 2023.

When asked to describe the trust, most interviewees used the established trust metaphor of being "purposefully pioneering":

> *a pioneer is somebody who goes in a certain direction and then others follow, so that's what we aim to do.* **(Headteacher)**

White Woods Primary Academy Trust

White Woods consists of 14 primary schools in and around Rotherham.

> *We've got some really diverse schools. We've got a small church school with like hardly any children. We've got large three form entry schools, we've got junior schools, we've got an infant school… ours is a really diverse catchment and we've got two schools that are in really high areas of deprivation.* **(Headteacher)**

The trust was established in 2013 by a "successful and charismatic" headteacher, who initially brought four local primary schools together on the basis of "come and join us and you'll be left alone. Nothing will really change" (CEO). Each school had autonomy, with very little collaboration between them and very little provided by the central team. The founding CEO left suddenly due to ill health in 2018, and the trust was without a CEO for a year before appointing his successor, a local headteacher who had experience of headship in both primary and secondary schools, in 2019. When the new CEO started she described the trust as "13 separate organisations… no connectivity… the schools were a disgrace. They were neglected, they were tatty. The ICT infrastructure wasn't there."

Since then she has led significant change: "it's like two different pictures completely" (Network Lead). The new approach did not suit everyone and around half of the headteachers moved on in the years that followed, allowing the CEO to recruit new heads aligned with her values and vision. The leaders we interviewed who had witnessed the changes described them positively. The previous culture was described as being "in competition" with colleagues, with a lack of trust, whereas the current culture was seen to reflect a sense of authentic trust - being able to "pick up the phone" to ask for support without fear of being judged. Another interviewee used the metaphor of a harmonic pendulum: where each school was previously its own ball, doing its own thing, but now the rhythms are aligned.

What do the five trusts mean by a 'whole education'?

05

Valuing a broad range of outcomes

In all five trusts, ensuring a 'whole education' meant providing a range of opportunities and experiences that included, but went beyond, academic attainment and exam results.

One example was Meridian, where a core value is: "The Pursuit of Excellence – an academically rigorous curriculum that stretches and challenges students and develops aspiration", but this focus is combined with wider values, including: "Extending Boundaries of Learning" and "Achievement for All". The CEO explained how, early in the journey of the trust, he had appointed a trust Director of Maths with a remit to improve GCSE results, but quickly became "frustrated with myself about how that sat with my values." As a result, the next trust level appointment was for a Director of Performing Arts because "we're not just… about getting good exam results, which is important and the kids need it and we must do it, but we have to keep the other stuff."

LiFE includes its commitment to 'whole education' in its vision and values statement, which it defines as: "academic excellence co-existing with an exceptional commitment to contributing to our communities and leading beyond the school gate." The trust CEO encapsulated a core focus for the trust's work in a speech to the MAT leadership away day: "from knowledge = power to agency = power." These statements introduce some of the wider aspects of 'whole education' that we explore throughout the report, including the importance of student and staff agency and of community engagement for real-world education.

A commitment to social justice

All five trusts reflected a deep commitment to social justice, which had three main aspects: equity, inclusion and belonging.

Equity for all young people, but particularly those facing disadvantage, came through strongly as a core value in all five trusts, as illustrated by the following quotes:

> *[It's about] ensuring that the most vulnerable and disadvantaged pupils are able to access the learning and experiences.* **(CEO, Pioneer)**

> *A child's just a child and a child can come from any socioeconomic background and any context. But there should be an equity of offer and there should be a rich and a life enhancing experience coming to any of our trust schools and the board are driven by that. I'm lucky because we're aligned in that.* **(CEO, White Woods)**

Similarly, inclusion and belonging were significant values in the trusts, although expressed in different ways. This included a focus on children with additional needs, but also reflected a broader sense that all children and adults have needs at different times and in different ways, so it is essential to maintain human relationships and a flexible approach to pastoral and other forms of support.[6]

Meridian has worked pro-actively to integrate inclusive expertise into the trust. It has opened three special schools through free school bids: "Their SEND expertise supports the mainstream schools. The whole thing's meant to be kind of an integrated ecosystem" (CEO). Being able to appoint an Executive Director of SEND "has broadened and opened a lot of eyes as to how [the trust] can be properly and truly inclusive across all of our schools."
Leaders at five of the trusts talked about their efforts to avoid excluding young people for behavioural reasons, although this wasn't necessarily a formal directive or written policy, as the CEO of White Woods explained:
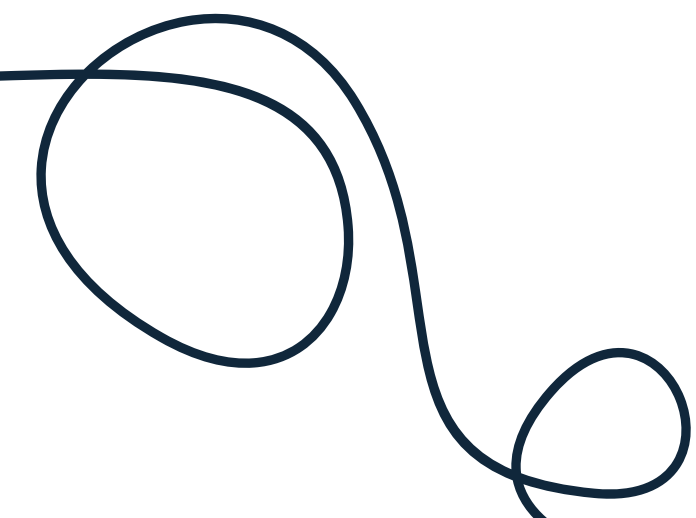
What do the five trusts mean by a 'whole education'? (Cont.)
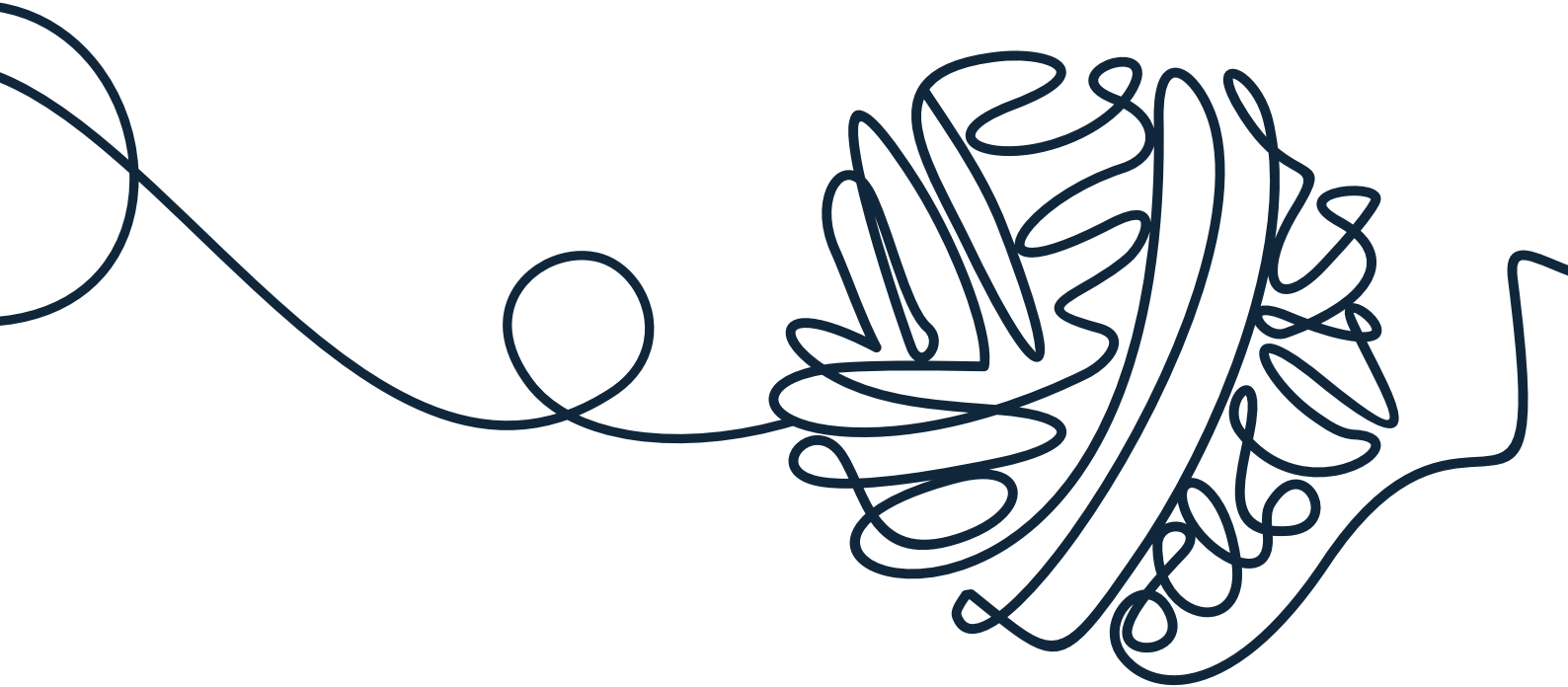
I don't want suspensions… Now I haven't said to our headteachers 'you must not suspend a child', but we've had no suspensions this year… We've talked about, you know, all the work about being trauma informed. We've talked about the 'why'… So we've done a lot of groundwork and suspensions have gradually reduced... We've got a SEND and Inclusion Support Worker now in the trust to help you do that… So yeah, I know I'm asking a lot and I'll give you every bit of support that I can… it is sort of an unwritten directive, but it's not a directive because we've all come to the decision that actually that's not necessarily the right thing for children. **(CEO, White Woods)**

Finally, leaders at Anglian explained how they saw a sense of belonging as a vehicle through which some of the biggest challenges faced by the trust and its young people could be mitigated. The CEO explained how the trust's work on SEND, behaviour, attendance/absence, mental health and so on was coming together into a new strategy, framed around the trust's core values and commitment to community engagement:

We're also challenging ourselves to think 'OK, so how are we connecting with the communities in which we're actually rooted?'… [which goes] back to our core values. **(CEO, Anglian Learning)**

Staff growth and well-being

Most, perhaps all, trusts across England would argue that they value their staff, even more so in recent years due to the recruitment and retention crisis. In all five trusts, this commitment was underpinned by a core view that a 'whole education' was about staff as well as children, as expressed by a Primary Executive Head at LiFE: "if you get these things right for your staff, they will get things right for the children."

In practical terms, the five trusts were not unique in their commitment to fostering positive workplace cultures, providing high quality professional development, and initiatives to enhance staff well-being and reduce workloads – although these were certainly strong and significant aspects of their practice. Some of the trusts could be seen as leading practice in these areas. For example, Pioneer is a 'flexible working ambassador trust' recognised by DfE and has a comprehensive 'WorkWell' strategy that includes commitments to meet flexible working requests wherever possible and to a cross-trust timetable which allows for collaborative time on 'CPDL Wednesdays'.[7]

More broadly, the five trusts (and, indeed, the wider Whole Education network) reflected a commitment to encouraging professional agency, as we explore in detail in the section on 'Navigating agency, prescription and autonomy.' This commitment was recognised as nuanced, with 'prescription' and 'autonomy' signalling the sometimes difficult trade-offs between individual, school and trust-level needs and priorities. Valuing staff was not the same as accepting poor performance and we heard about sometimes needing to "manage out" underperforming staff "with kindness." For the CEO of Anglian, staff needed to feel a sense of 'belonging' at multiple levels - "to their job, to their profession, to their school and to the trust as a wider institution." At LiFE, it was about a "whole belief system" which could enable colleagues across the trust to see how their work contributed:

> *It is about the whole child and a whole education, but you get that from having a whole belief system in your staff and in the community that you serve. It all comes tied up together, so things don't sit alone in isolation.*
>
> **(Primary Executive Head, LiFE)**

To achieve this, the trust invests in coaching for staff, which "enables them to feel valued". One interviewee explained that she was the headteacher at a school that had joined the trust in challenging circumstances, but the trust's commitment to coaching had enabled her to understand that she was now part of "something bigger":

> *What the trust did… they got us to believe in ourselves, because sometimes you get to that point where, you know, 'we've tried everything, so it must be us, we're not doing a good enough job'. But actually no, it's not. It is one of the most challenging schools probably in the country and, in that sense, in context, if you believe in yourself… and that's what the trust has done.* **(Headteacher, LiFE)**

Sensemaking and leadership

06

Figure 4 listed four different approaches to leadership decision-making in MATs – paternalistic, diktat, rule-based and democratic. In the Whole Education workshops with senior leaders from all 20 trusts, participants recognised that even if they might aspire to be "democratic" there were times when other approaches were required, such as the "unwritten directive" on suspensions example given above. In practice, decision-making is rarely as clear cut as these descriptors suggest: for example, one case study CEO explained that "co-creation" (an approach ostensibly geared towards developing 'democratic' decisions) could also mask a degree of direction in ways which could be seen as manipulative:

> *We're not very directive as a trust,*
> *although we are more directive than*
> *perhaps we would argue we are.*
> *We just do it in a way where we're kind*
> *of co-creating direction… and sometimes*
> *I think I'm a bit manipulative with that.*
> **(CEO)**

What was distinctive about the case study trusts was that key decisions and approaches were frequently debated, revisited and evolved by groups of trust leaders as they reflected on data and experience. This deliberative approach aligns with Karl Weick's notion of sensemaking:[8]

• organisations are sensemaking systems that perpetually create and recreate conceptions of themselves and their environments

• sensemaking is thinking – negotiated, collective thinking

• sensemaking reflects processes by which organisational leaders seek plausibly to understand ambiguous, equivocal or confusing issues or events.

We focus here on two examples of sensemaking, from LiFE and Pioneer. Both demonstrate collective, distributed thinking in response to ambiguous issues and both lead to innovative organisational responses – a new curriculum approach at LiFE, and a new trust-wide leadership development model at Pioneer. We have selected these because they represent distinctive and ambitious attempts to realise 'whole education', but it is important to stress that sensemaking in the trusts was generally more 'everyday' (i.e. incremental and ongoing), reflecting a level of curiosity and openness to different perspectives, so did not require significant new initiatives such as these.

LiFE: a 'skunk works' approach to developing the Real LiFE curriculum

The CEO of LiFE described the origins of the Real LiFE curriculum as a 'skunk works' project:[9]

> *It was very much 'we don't want our*
> *Headteachers involved'. We want to set out*
> *the problems we face with our principles*
> *around curriculum and why it's not landing*
> *and we want to give real power and*
> *agency to a group of our staff, to look at*
> *the very best practice, you know, nationally,*
> *internationally, and reform that and produce*
> *something that's genuinely right for our kids.*

The first step was getting buy in from leaders across the trust: "we set out what the problem was, and everybody agreed it was a problem." At the time, the trust was working with the CEO of a local construction company, who said he needed "level 3, level 4 apprentices in construction" and "kids who are confident in multiple languages". As a result, trust leaders started to think differently about "what skills actually mean in the workplace".

12 staff members were invited to form the 'skunk works' group from across the trust, including from different schools and job roles. The group was initiated by the CEO, but he then left the first meeting after setting some parameters:

1. The changes had to be suitable for both primary and secondary

2. The new approach had to involve interdisciplinary learning

3. It would be launched in September 2021 (18 months later) to provide enough time for a rigorous development phase.

Two weeks later the country went into lockdown and schools closed:

> *At a time when everyone else was*
> *frantically searching to keep things going*
> *the way they were, actually for me it was*
> *really exciting because we were looking*
> *to the future, looking at correcting all the*
> *things that had gone wrong.*
> **(Trust leader, LiFE)**

The Real LiFE curriculum developed by the group addresses all subject areas including PSHE through timetabled CREW (Coaching, Reflection, Enrichment and Well-being) sessions, with students completing periodic 'Missions' based on the UN Global Goals, which they and their teachers assess using rubrics.

The 'skunk works' group proposed piloting the new curriculum in all three of the trust's then secondary schools, while the Primary Executive Headteacher worked to involve the trust's primaries in parallel. During the pilot year (2021-2022) there were differences in how the schools structured the new approach. Each secondary ran a single Y7 pilot group, but these differed in size (24 – 32 students), in the time allocated (two schools allocated an hour and fifteen minutes each morning, while the third was more varied), and in how small-group 'CREW' coaching was structured and run. Similarly, in primary, one school ran a 'pre-pilot' project (through which pupils tracked road traffic and presented their improvement proposals to Leicester's Mayor), whereas the other took a more cautious approach.

Reviewing the pilot year, trust leaders saw clear evidence of the positive impact of the new curriculum, particularly in the schools that had adopted a more structured approach:

• behaviour points decreased

• students transitioned more smoothly from primary to secondary

• students made better progress in reading than expected

• in one school (which had also moved to mixed ability maths teaching), the students involved made "more than double the amount of progress compared to any other group."

Following the pilot, in 2022-23, the new curriculum was offered to the whole of Year 7, although with different schools adopting different approaches once again. That year the trust faced several logistical challenges around timetabling, funding and finding "teachers who value teaching holistically as opposed to teaching [their] subject," all of which caused a loss of momentum to some extent. New schools joining the trust in "vulnerable positions" in terms of Ofsted needed flexibility and time to address urgent priorities before engaging with this new way of working. In 2023-24, these challenges continued but further work has sought to strengthen cross-trust learning and change, including through the development of assessment rubrics and to align the work with cross MAT subject communities. This journey had led to some hard learning around trust-wide implementation:

> *You kind of assume, probably naively, that when you do a big thing around curriculum or assessment or safeguarding that those heads are taking it in and then they're going to go and deliver that message in exactly the same way. And you're going to get by-in, and it's all going to be great. But at the same time, we've got two (Ofsted) Category Four schools, we've got, you know, three schools going through age range change. We've then got schools facing some financial difficulties, you know, we can't recruit. And then head teachers are going 'yeah, this is great and I believe in it. But I've got all this other stuff to worry about'.*
> **(Trust leader, LiFE)**

Reflecting on these challenges, leaders have mapped next steps, seeking to offer differentiated support while still expecting all schools to adopt the new curriculum from 2025. This commitment has been accompanied by an increased level of direction to schools, for example in terms of the time allocated for 'CREW' each morning.

Pioneer: a new approach to leadership development

Pioneer's CEO and Director of Education are both undertaking EdDs at UCL. The CEO had researched the trust's culture as part of her studies, involving a wide range of staff in focus groups using the typology in Figure 4 as a framework. This engagement with research coupled with a fierce commitment to diversity, equity and inclusion and an openness to challenge had clearly shaped the trust's culture and approach:

> *I think we are challenging as in we've got a culture that can tolerate people having diverse ideas and thoughts and perspectives on things and therefore challenging our thinking.* **(CEO)**

The trust has a notably sophisticated professional and leadership development approach, underpinned by the Director of Education's EdD research:

> *My research has been into leadership development and how we develop leaders in schools… And I felt that some of the professional development we were offering, NPQs for example… was sort of adequate, (but) I don't think it was sufficient to be able to prepare school staff for the challenges of the roles that they might face.* **(Deputy CEO)**

The Director of Education wanted to "democratise leadership development". Six years earlier his first step had been to invite a diverse group from across Pioneer to be involved in a working party to develop a leadership development programme. Out of this came the Pioneering Leadership Programme, centred on three elements, including 'sensemaking':

• Heat experiences

• Colliding perspectives

• Elevated sensemaking

The programme is open to all staff across the trust, including TAs and office staff, and around 200 have completed it so far, across 15 cohorts. It focuses on

developing the attitudes, values, mindsets and beliefs of the individual, rather than specific skills and tasks associated with the 'job' of school leadership. It includes clear messages "around everyone being a leader, and about how we want to empower individuals to be able to make change, and how we will create the conditions for that to happen":

> *I think it's been really important for transmitting our culture, not only to say to people 'you're part of this thing that is Pioneer and we're investing in you through this programme', but sort of implicitly and explicitly demonstrating our values.* **(Director of Education)**

Staff from a new joining school were invited to participate in the programme before the school joined, allowing relationships to form which "completely humanised the trust." We interviewed various participants on the programme who were positive, although one had found the emphasis on introspection and sharing personal experiences challenging.

More recently the trust has developed:

• **A Pioneering Leadership Framework,** which articulates positive as well as contra indicators for behaviour across the trust

• **A 'Working Title leadership programme'** which is available to those from underrepresented groups in educational leadership according to national data.

Summary: sensemaking and leadership

In Figure 2, we posed the following questions in relation to this knotty issue:

• What forms of leadership are required across trusts and what impact does this have?

• To what extent do trust leaders engage in sensemaking – acknowledging ambiguity, clarifying core purposes, reflecting on evidence and experience, and making shared decisions?

• How does this help to strengthen distributed leadership and cultivate system leadership?

The Real LiFE curriculum and Pioneering Leadership Programme provide two very different responses to these questions, but together they help to illustrate how trusts can:

• Recognise and respond to ambiguity – taking time to engage in extended collective sensemaking and organisational learning in relation to core areas of practice and organisational development (even in the context of busy school and trust life)

• Unlock distributed leadership and draw on wider perspectives by asking diverse staff to collaborate to shape meaningful change.

Structural integration

07

The 'Structural integration and knowledge exchange in Multi-Academy Trusts' article identified three options in relation to structural integration: appointing a central team, relying on school-to-school support, or giving schools (earned) autonomy. It highlighted that most trusts –particularly medium and larger trusts – had fully or partially centralised most back-office functions (e.g. finance and HR), with school improvement capacity also likely to rely on central teams, sometimes in combination with school-to-school support and/or earned autonomy for higher performing schools. But these trends were far from uniform and the research revealed significant variation - from large to lean central teams. For example, one trust in the DfE study had appointed central leads for English and Maths but then disbanded this team in response to concerns from headteachers. More recently, media reports have highlighted an example of one trust where school staff have threatened to go on strike in protest at the high level of top-slice charges which fund central teams and services.[10]

We focus here on two examples - White Woods and Meridian – outlining their approach to structural integration. Leaders in both trusts expressed similar beliefs about the rationale for integration: that centralisation of business and operational functions ("taking away the operational noise") supports headteachers to focus on their core educational responsibilities ("the important stuff"). However, whereas White Woods' CEO has centralised many areas, Meridian (a much larger trust which has also gone through two mergers) has moved away from its centralised model to a more hybrid approach. These examples help to illustrate the 'constant dance' as leaders seek to balance efficiency, effectiveness, relationships, ownership and the need to respond to the contextual diversity of schools.

White Woods: "we're dealing with human beings in different contexts"

When the CEO joined White Woods (a primary only trust) in 2019, she found minimal integration. The founding CEO, who had been in post since 2013, had run a model of "executive head… with a very small central team." The result was "13 separate organisations… the schools were tatty, the ICT infrastructure wasn't there":

What they needed at that point of the early MAT was someone who was going to just bring it all together, who actually was going to galvanise this sense of a whole, or how we're going to do things around here. **(CEO, White Woods)**

She quickly began introducing cross trust systems so that data could be shared more effectively, and disentangled the trust's operational functions, such as ICT, from the Local Authority. Over time the trust has centralised most back-office staff and has standardised many systems; for example, moving every school onto the MIS platform Arbor. These changes were seen to be more efficient and effective, for example by improving the "central intelligence" of the trust in areas such as SEND and attendance and by supporting cross trust collaboration. The CEO acknowledged that this also gave her stronger oversight in areas where compliance is critical: "The rationale for tightness is it's easier to get assurance" (CEO). The headteachers we interviewed were largely happy with these arrangements:

Having things like the central finance team and things like that does take a massive weight off. **(Primary Headteacher)**

So for me, I have no interest in finance, premises, I don't care about that. I care about teaching and learning in schools. So I feel like taking things centrally like finance and premises is perfect for me because my day-to-day business then is school improvement. **(Primary Headteacher)**

That said, there were some more problematic areas. One was ICT, where the CEO acknowledged that while her own experience was with Apple, her ICT Lead used Google: "I have an issue that we tell the schools what they are going to have, because that would really pee me off as a headteacher". Another was Educational Psychologists, where one headteacher was resistant to the CEO's proposal to move away from LA provision to an outsourced model. These issues had led the CEO to reconsider her approach somewhat:

Now, my thinking has been challenged around this because the more I read about operational excellence [it recommends to] find one way, find one way that works and do it. Now, I don't believe that it works when we're dealing with human beings in different contexts... I think there are some fundamental principles… (that it is) your job to digest and make sense of and implement in your school. **(CEO)**

Meridian: From centralisation to a hybrid model

The early decision to go for a hard federation (a "marriage") has continued to shape Meridian's approach to structural integration. The trust has centralised many functions across both the back office (IT, finance, HR, estates) and school improvement functions (for example through the use of Executive Principals). It has also merged with two other trusts, so has needed to integrate the central teams from these trusts.

In addition to the benefits identified above (efficiency, effectiveness, assurance, coherence etc.), these central teams offer significant capacity and expertise, dealing with challenging issues that schools on their own could not cope with. One example was a school leisure centre: "We took that into the core, we've dealt with it, we've dealt with the swimming pool which unfortunately had to close, it wasn't viable. And we're going to hand it back to the school as a going concern" (COO/CFO).

Meridian's COO/CFO described the relationship between central operational leaders and school leaders as that of a "supportive friend": "I think personally it's very important that it is the principal's budget, it's the principal's school. We're here to support them on their journey…so we're just supportive friends." Her aim was to "centralise things that made sense to centralise, but at the same time giving the schools freedom to be who they are". This included budgets, where headteachers were expected to manage their own budgets within centrally set parameters, such as staffing ratios, although these were described as moveable and "up for discussion": "if they wanted to offer Latin at GCSE… I'd say it's a conversation point" (COO/CFO).

The COO/CFO had significant experience working in large commercial organisations, most recently in investment banking, but acknowledged that decision-making in education was driven by the needs of children rather than business. She described going in as Interim CFO at the trust Meridian took over which was "massively broken" with "a central function that was in two million deficit":

The difficulty is as soon as [the CEO] walks into a school, even though the due diligence says walk away… he's met three of the children and they are wonderful and his heart is there and I can't say no to that because it's the right thing to do. **(COO/CFO)**

This view that education is not a business and that decision-making is not driven solely by efficiency concerns underpins Meridian's decision to move away from fully centralised core functions towards a hybrid model. The decision is also an example of sensemaking, with senior leaders recognising and responding to the downsides of a centralised model: "it's a dance, a constant dance" (CEO, Meridian). When the current COO/CFO became finance director, in 2015, the trust had already taken "every member of finance staff into the core". However, this meant that schools had begun to "absolve themselves for any responsibility for any ownership of those members of staff". As a result, a "real mismatch" was created whereby finance personnel did not feel part of the communities of the schools they were serving and did not see how their work formed part of a larger whole. In response, the trust has adopted a hybrid model: in practice it continues to "centralise professional expertise" and has standardised operating systems, but staff are physically placed back in the schools:

So they're included in the school BBQ, they are part of the collection for somebody getting married, they are part and parcel of the school and they see staff members, and staff members see them with the same lanyards, and it's a strange piece that I haven't really seen anywhere else, but it makes them feel like they belong. **(COO/CFO)**

This hybrid model includes a regional approach to school support on operational issues. For example, while HR is run centrally, the team includes area managers and decisions are made in dialogue with front-line leaders via regional hubs which meet termly. These meetings are open for senior trust leaders, academy councillors and trustees to attend as necessary, and include visits to relevant people and schools, followed by a discussion around the 'termly pack' - "a living breathing document". Headteacher interviewees valued this approach because it responded to their different contexts: "they've got brilliant, brilliant expertise, but they come in and then they realise that, OK, this is what it looks like here."

Reflecting on this hybrid approach, the COO/CFO explained:

I am very mindful that it's probably more cost efficient to have a fully centralised model, but in terms of staff retention, in terms of community feel, I don't think you actually get good value out of [centralisation] because actually you end up losing those things.
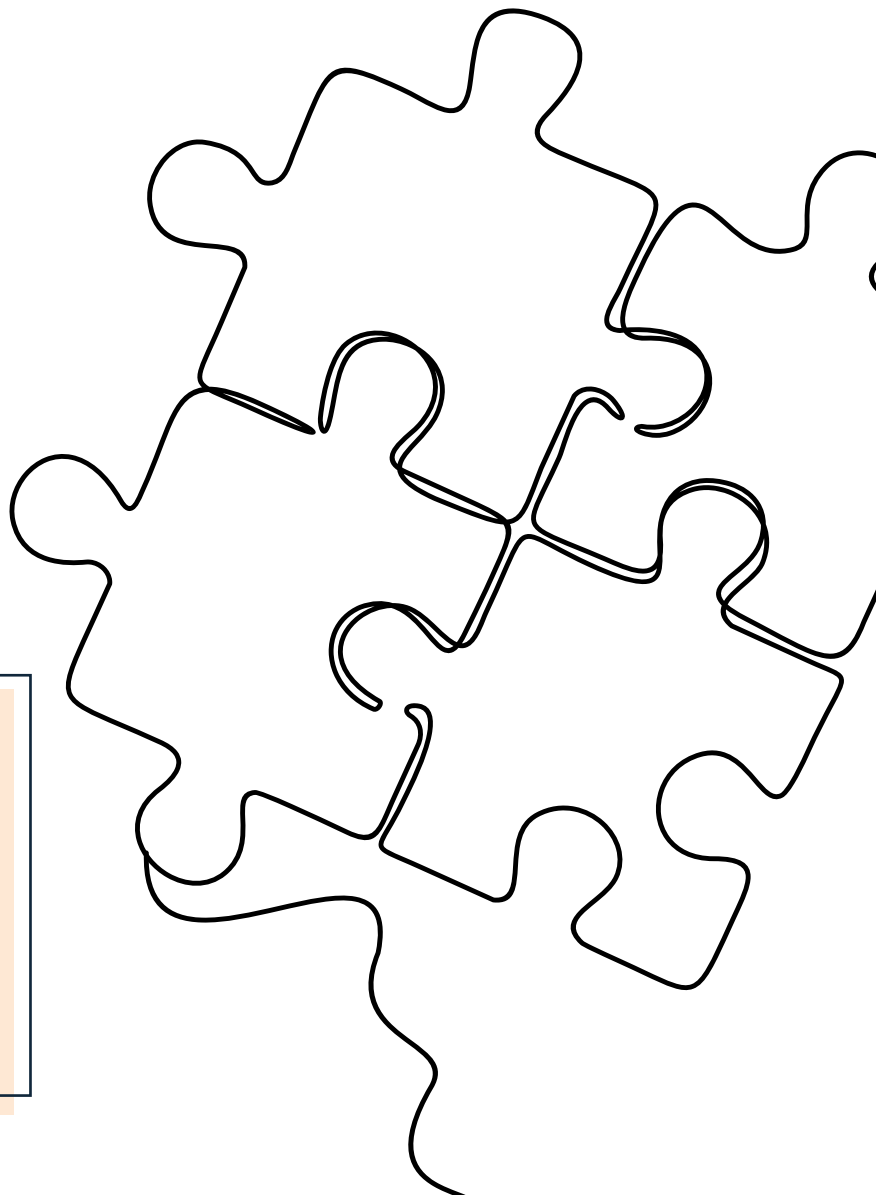
Summary: structural integration

Figure 2 posed the following questions in relation to structural integration:

- Where and how should trusts seek integration, across both 'back office' and school improvement functions? Where should responsibility and capacity for each function sit: in a central team, in schools and/or across a hub or network?

- How can trusts best work to clarify and align around shared purpose, values and culture?

- How can trusts evolve as they grow, so that cultures and systems adapt and new members feel ownership?

The examples of White Woods and Meridian begin to address these questions. Both trusts have centralised many functions, in particular across the back office, and both can evidence benefits from this in terms of efficiency, effectiveness and organisational coherence. School leaders largely welcome these developments where they reduce administrative loads and are responsive to the specific needs and contexts of individual schools. However, both trusts recognise that centralisation is not always optimal and Meridian's decision to move to a hybrid model in which central staff are located in schools and area teams, reflects the need to balance efficiency and effectiveness with relationships, responsiveness and belonging in pursuit of 'whole education'.

Knowledge mobilisation and boundary spanning

08

A core argument for Multi-Academy Trusts is that they can facilitate the sharing of knowledge, expertise and practice across member schools and staff, thereby enhancing professional development and building collective capacity for improvement. Knowledge mobilisation has been an overt feature of many of the approaches described so far in this report, such as Pioneer's leadership programmes. As we explore in this section, approaches to sensemaking and structural integration also shape knowledge mobilisation. Similarly, the following section examines agency, autonomy and prescription – showing how alignment around shared concepts, language and/or tools will underpin how knowledge is developed, codified and shared.

We focus here mainly on three trusts to explore approaches to knowledge mobilisation. This includes the use of 'boundary spanners' – key individuals who work across different parts of the organisation or who provide a bridge to wider knowledge and expertise beyond the trust, and who can thereby help to translate and apply ideas across different contexts.

White Woods: an integrated culture and approach

At White Woods, the work on structural integration - described above - was an essential platform for knowledge mobilisation. For example, the CEO explained how a lack of systems for sharing data prevented meaningful discussion about progress and improvement:

> *The first set of SATs came through, and I had only been here for a month. I was like 'Okay, so how do we collate them? What's the method you use?' And they were just kind of like 'oh no, we don't share each other's, you know, they don't get shared until they're published.' And I was like 'oh, well I kind of want them, and we need to all know what we're doing. We're a trust.'*
> **(CEO, White Woods)**

The CEO has worked to develop a culture of curiosity and challenge. She is undertaking an EdD and regularly shares her reading with colleagues, for example through a trust-wide pedagogy network that she leads. This has had a "trickle-down" effect and we heard from various leaders how they now read and refer to research.

Part of the CEO's work to develop a more integrated, trust-wide ethos and approach has been to develop shared language and frameworks which provide a platform for collaboration between schools. Forging shared ways of thinking and working was not always straightforward, but she saw this work as essential for improvement:

> *I think it's trying to strike a balance. It isn't about us all just, you know, dancing merrily through the days, and there being no framework and no clarity of expectation. And I think that's probably what we're wrangling with now.* **(CEO)**

The CEO has developed a leadership structure that encourages boundary spanning, with a relatively small central team bolstered by an expectation that all headteachers will contribute at least five days a year to cross-trust work. Each headteacher takes on a different role, such as cross-trust Attendance Lead, supporting school literacy leads, or leading subject networks. Other school-based leaders take on equivalent cross-trust roles, such as the Early Years Lead and the SEND Lead. School leaders are also expected to contribute to an annual schedule of 'peer reviews' and 'challenge reviews', where 'peer reviews' focus on the trust's priorities for school improvement, while 'challenge reviews' allow for headteachers to select the review focus. This way of working was credited with transforming the culture of collaboration amongst headteachers, allowing for honest feedback and peer learning. Finally, headteachers and trust leaders are also encouraged to undertake 'curiosity visits' to other trusts and schools, including through Whole Education.

Knowledge mobilisation and boundary spanning (Cont.)

LiFE: codifying and sharing knowledge from a ground-up innovation

LiFE's approach to knowledge mobilisation reflects its model of sensemaking, with staff at various levels given a role in developing and sharing practice through "ground-up innovation". This is seen to help ensure individual and collective ownership and buy-in:

> *Ground-up innovation has been fundamentally important to us. But it also then helps us with the delivery… because it's co-professionals that have co-constructed what we're talking about, rather than '[name] decided this is a really good thing to do.* (CEO)

The approach reflected a deep commitment to avoiding prescription and recognising that practice-based knowledge can and should be generated by professionals within the trust, despite calls from the trust board to articulate and impose a curriculum strategy from above:

> *They [the board] keep wanting me to write the strategy statement that tells everybody 'this is what we're doing'. And I'm saying this is the strategy statement of the staff, and that we've co-created it together… [The] trust strategy is the networks, the collaborative networks that will then give us back the strategy.* (CEO)

In practice, as we described in the section on sensemaking, the process of scaling up the Real LiFE curriculum has been challenging, with different schools adopting different approaches and some newly joined schools facing wider issues (such as poor Ofsteds) which made it hard for them to engage with innovation. As we explained, the trust has continued to learn from these experiences, creating shared curriculum resources and assessment rubrics and defining clearer expectations in terms of the time that all schools must commit to this each day.

In order to facilitate these changes, the role of the core team who developed the curriculum has changed and the approach to mobilising knowledge has evolved. The leader responsible for Real LiFE across the trust described how he was: "stepping up, not stepping away, but shifting more responsibility onto the [curriculum leaders in the schools]". Meanwhile, the 'skunk works' team of colleagues he worked with to develop and pilot the approach have focussed on codifying their knowledge into the shared curriculum resources and rubrics. The plan is now to draw on their expertise to support wider colleagues through cross MAT subject communities.

These developments were not magic bullets and it was acknowledged that some leaders and teachers who had not been closely involved remained nervous or sceptical about the curriculum, especially where a project (or mission) might be outside their specialism. The centrally created lesson plans and resources could help with this, but still:

> *If it's not in your specialism, if you don't know it off by heart, invariably the central team gives you a powerpoint and you're reading the powerpoint ten minutes before you deliver it to the kids… we've had to do that with some of the topics, like climate action… and some people don't like that.*
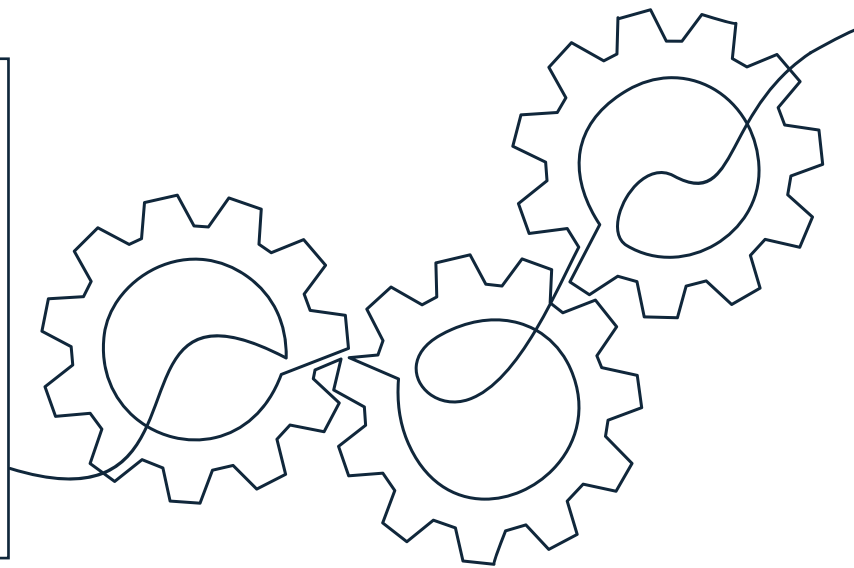> (Trust lead)

Anglian: using co-design and communities of practice to build shared knowledge

As discussed in the following section, Anglian has developed a set of blueprints and frameworks which serve to codify and consolidate knowledge from across the trust and provide a vehicle for developing shared language and approaches while still respecting headteacher autonomy. This has required significant efforts to involve school leaders and staff in co-design, paying careful attention to agreeing shared language. This work has involved combinations of strategic groups (in particular the Trust Leadership Group), subject networks and task and finish groups which focus on developing a particular strategy or policy. While the work of these groups was generally welcomed by interviewees, one school leader expressed frustration that they could feel disconnected from the daily reality of work in schools.

Subject networks provide a key mechanism for knowledge mobilisation across the trust. The trust has avoided appointing central subject leaders (e.g. Director of Maths) in order to maintain school autonomy: "we have historically not wanted to take away that prerogative of schools or inhibit people's professional development by having someone who's sort of controlling what you do." Instead, there are cross trust subject networks, described as "communities of practice" and the "CPD vehicle for your subject". However, while participation in these networks by teachers is "theoretically directed time", it can be a "hard sell" to get everyone to attend:

Depending on your personal philosophy, depending on your sense of workload, not everybody buys into that. Some people think, well, unless this is practically useful for me to know I'm less interested in attending because I've got books to mark, I've got lessons to teach tomorrow. So, there's a bit of a cultural piece.

(Director of Education)

These attendance challenges have been exacerbated by the decision to move the network meetings online, in the interests of inclusivity, and by trust growth. While the online network meetings were seen to work reasonably well for established groups with prior relationships, they had not been so successful for newly formed groups. Meanwhile, as network membership has grown – as more schools joined the trust – the size of the groups is sometimes unwieldy.

Summary: knowledge mobilisation and boundary spanning

In Figure 2, we posed the following questions in relation to this area:

- How do trusts 'learn' - from their own internal practices and from their external environment and research?

- How do trusts identify, codify and move knowledge and expertise around – for individual and collective learning?

- How can trusts best identify and support 'boundary spanners' to bridge organisational and attitudinal silos and translate knowledge and expertise in dynamic ways?

A key message here is that successful knowledge mobilisation cannot be seen as a stand-alone activity. This is why 'roll-out' approaches to sharing knowledge - which rely solely on codifying and then communicating a new approach via conferences, professional development programmes and policy documents - are rarely successful. Rather, we see in all five trusts how knowledge mobilisation is a constant and evolving set of processes, involving both knowledge creation and knowledge sharing. These processes are bound up with the different approaches to sensemaking, structural integration and navigating agency, autonomy and prescription in each trust. Ultimately, as we explore in the following section, if teachers do not feel a sense of professional agency and trust they are unlikely to generate and share their expertise, waiting instead for the 'roll out' to tell them what to do. That said, generating, sharing and embedding knowledge in ways which strengthen practice and capacity remains challenging, as we saw in this section: LiFE's "ground up" innovations do not always secure buy-in, so must be combined with some prescription, while Anglian's co-design groups and subject communities are not always seen to be working for everyone.

Navigating agency, autonomy and prescription

09

This was by far the 'knottiest' area for members of the Whole Education network. Getting the balance right between "top-down uniformity and bottom-up individualism" by designing frameworks and policies which provide productive "enabling constraints"[11] was seen as critical for unlocking teachers' professional agency. Research on teacher retention has shown how professional autonomy, relational trust and distributed leadership are key, yet too often MATs are seen as overly tight and coercive, even if this is done with the best intentions, such as reducing teacher workload.[12]

The issue stems from the fact that MATs must exert some level of hierarchical control over schools, both to fulfil their legal and financial obligations and because, done well, centralisation can offer increased coherence, efficiency and effectiveness, as we have seen already in the previous sections. However, as Meridian's experience of structural integration indicates, centralisation can also:

• create silos between central office roles and schools

• restrict the formation of human relationships and lateral networks which facilitate informal knowledge flows

• be slow and unresponsive to the needs of different schools and contexts

• reduce local ownership, meaning that school leaders and teachers lack the autonomy and agency required to sensemake and find solutions to problems of practice.

While getting the relationships right between central teams and schools is certainly important, there is more to navigating agency, autonomy and prescription than this. At root it is about values, cultures, identities and beliefs about the purpose of schooling and the role of teaching and leadership in a highly accountable and outcomes focussed system.[13]

At an operational level, trust leaders must decide whether, when and how to: a) standardise and prescribe; b) facilitate collaborative alignment; and/or c) encourage autonomy and organic development. Questions to consider might include:

• When and why might trust leaders expect all schools to adopt the same lanyard, the same phonics scheme or exam board, or the same templates for curriculum-based budgeting?

• Where a trust provides core resources – such as curriculum schemes or lesson plans – what are the trade-offs between consistency and flexibility, or between reduced workloads and reduced ownership?

• How should a trust hold school leaders accountable for performance – and what might be the unintended consequences of any given approach?

We focus here on examples from two trusts – Anglian and Meridian. Interestingly, both were founded by Cambridgeshire Village College schools, with proud histories of providing community education.[14] Anglian was founded on a commitment to headteacher and school autonomy but has, over time, developed a strong central back office (HR, Finance, ICT, governance and estates). It has also gone through a "hard won" process of alignment on wider areas of school improvement, although in many respects it is still a decentralised trust; for example – as explained in the previous section - it does not have executive heads or curriculum leads in its central team. In contrast, Meridian is described as "quite prescriptive", reflecting the early decision to push for hard federation: "we're getting married, we're not going steady." We explore how these different approaches to navigating agency, autonomy and prescription play out.

Anglian: agency within a framework

Anglian was founded on headteacher autonomy but has gone through a "hard won" process of alignment to achieve a model that leaders describe as "agency within a framework". The headteachers we interviewed were clear that they had autonomy ("I'm definitely a principal… not head of school") but we also heard that "the autonomy is great... (but) it can be quite inefficient." (Deputy head).

The starting point for developing greater alignment was work led by the CEO involving governors, heads and wider groups to explore what kind of trust they wanted to be, using the typology in Figure 4 as a starting point. This process enabled them to define six core principles as the trust's 'DNA' (Act with unity of purpose - Deliver contextually; Build capacity at all levels; Leave no Academy behind; Nurture a healthy organisational culture; Seek excellence; and Think systemically). For the CEO, these principles provide a 'structure' and 'narrative' that leaders can work from, helping heads to see their roles within the bigger organisational picture:

It's interesting because what we're trying to get leaders to understand is it's messy… But as a school leader, if you're trying to fix a problem you can just walk down the corridor… You go down there, you deal with it. When you're trying to steer a larger organisation, you're working through a lot more people and you're having to do a lot more compromise. **(CEO)**

The principles provide a "shared language" and act as touchstones that leaders can return to as they engage in challenging conversations around how to navigate autonomy and alignment. "Getting the language right" was difficult because "everybody wants to challenge every single word", but the CEO embraced this because "we're a collaborative organisation, we're involved heavily in co-construction…we work together to test all of this with language."

Building on the principles, Anglian has developed four "blueprints", covering People and Leadership, Curriculum, Inclusion, and Safeguarding. Each blueprint was co-designed with headteachers and sets out the trust's "aspirational position" for practice in that area. They are described as "quite wordy" and represent a "wide range of views." This breadth allows scope for differences between schools: "we're

quite a broad church, and I suppose in that sense, a lot of the debate is always around how broad do we want to be?"

The blueprints provide a focus for the trust's school improvement work. They inform school improvement plans, are used as the basis for peer reviews between schools (known as "blueprint enquiries") and frame the agenda for governors' meetings. There are four blueprint enquiries a year in each school, focussed on the four blueprint areas, with different staff visiting the school depending on the area and phase. For example, in secondary: headteachers undertake people and leadership enquiries, deputies lead on curriculum, DSLs on safeguarding and SENDCos on inclusion. Over time, this work was seen to be building a more aligned culture, with stronger relationships and shared language:

I think slowly but surely, more people are getting involved in this healthy process about school improvement. And I think that the trust made a good decision at the right time to bring out this, this document, this core principles document. **(Headteacher)**

In addition to the blueprints, the trust has developed 'frameworks' covering teaching and learning and professional learning. The trust lead explained that "we call it a framework, not a policy… (which) sets out some minimum common expectations… and then it's a set of tools and resources… (so) much more of a handbook than a policy". This means that while the frameworks do set out core expectations for schools and teachers, in line with established research and good practice:

What it doesn't do, and this is deliberate… is to say 'all your lessons need to look like this'… So what you should see is that if you were two teachers in different schools, I would look at it and go, 'OK, well that fits within the teaching framework'. But your lessons might be completely different. And as long as it's good teaching within that context, we're OK with that. **(Trust Leader)**

Interestingly, several of our school-level interviewees in both primary and secondary schools argued that more direction and standardisation might be helpful, particularly at a time when school staff were too stretched to co-design everything or to develop unique approaches in every area. For example, one primary leader argued that trust-wide alignment on assessment could have saved time and supported greater cross-school collaboration:

We used to be [name – assessment company] and everyone was doing [name] and they were all bought in. But now they just aren't buying [name]. So we've got five different assessments going on in all of our different primary schools… I think we've got our aligned kind of values…. (but) I think the trust haven't got enough… of a centralised sort of model for how assessment should look… it's hard for us to be speaking to different languages.
(Deputy Head)

Meridian: values-based, tight-but-loose, relational

Meridian's values are described as the bedrock of its work: "[they are] always interwoven in everything that you do, the values aren't just something that you have on a bit of paper" (Secondary Executive Headteacher). In short form the values are: Valuing people; High quality learning environment; The pursuit of excellence; Extending boundaries of learning; and Achievement for all. When the trust first formed, over a decade ago, cross-trust working groups were convened to agree how the values could be enacted. One example was the decision to adopt vertical tutor groups in all secondary schools, reflecting the commitment to 'Valuing people'. Since then, the trust has sought to develop frameworks for enacting the values across different contexts. According to the CEO the focus is on "coherence in the application and the enactment of those values, but not necessarily consistency" because the values are:

… meant to be loose… you can fit most things inside them, but you can't fit some things. So, you can't fit not letting children go on trips. That ain't going to work because 'Extending the boundaries of learning' means you can't do that.
**(CEO)**

In practice, the trust is now much tighter than Anglian in many areas, partly reflecting Meridian's original commitment to a "marriage" and partly how practices have converged over time, overseen by a significant core team of executive heads and subject leads. Several of the executive principals we interviewed had been headteachers in the schools that first formed the trust a decade earlier. They reflected that the idea then was to have a 70/30 split: meaning 30% of decisions would be taken at the trust level, and 70% would be at school level. Over time they argued the percentage had changed to nearer 60/40 in favour of the trust. They felt this reflected the trust's institutional learning, having developed a better understanding of "what works" having been "tried and tested across a number of schools in multiple contexts." An example was secondary maths, where schools are required to use the same exam board, and this is seen to have facilitated collaboration and alignment in pedagogic practices:

So in fact… our driver for wanting to have common exam boards isn't to dictate the pedagogy in the classroom, it's to facilitate support and conversation. And we, we have come to like actually (adopt) a really tight teaching model for maths across the trust, but that's evolved. It hasn't been imposed and it's evolved with this, you know, with the schools.
(Secondary Executive Principal)

The CEO explained that having co-designed and defined preferred approaches in many areas, there were now few opportunities for new joining schools to influence this:

Navigating agency, autonomy and prescription (Cont.)

I understand that if you weren't there at the point of co-creation, it feels like it's being imposed. I kind of get that, but that's OK… if you don't like it… you're probably in the wrong place anyway, so maybe go and play with another team. - **(CEO)**
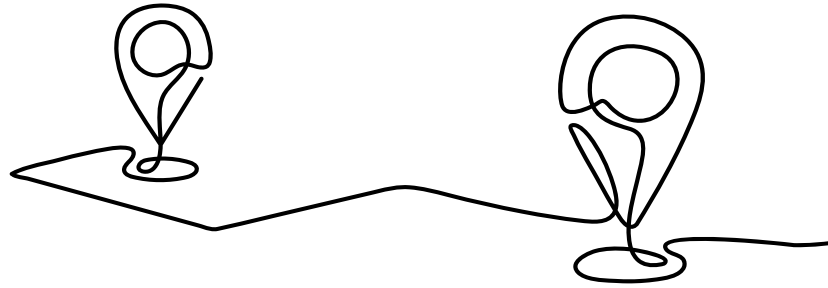
Equally, Meridian's leaders argued that prescription did not remove the scope for agency by heads and teachers: "parameters can be liberating… if you've been provided with a certain area that you can work within, I think you can get very creative within there" (CEO). This relates back to the flexibility in how the trust's values are applied and the importance of relationships (see Section 3), although executive leaders did also acknowledge a concern that some heads and schools could become compliant and not (feel able to) exercise agency.

The trust has worked to design tight-but-loose tools which embody the values and allow scope for collaboration and agency. One example is the Academy on a Page Evaluation (APE) dashboard that is used to track the work and performance of trust secondary schools. The APE is "unapologetically complex" and built around the trust's "values structures". It includes standard metrics, such as exam performance, along with a series of measures for tracking breadth and balance across the curriculum, such as the proportion of students engaging in wider learning, assessed via engagement in trust award schemes. The APE also includes results from audits in areas such as attendance and safeguarding. Executive leaders use the APE to assess schools that need additional conversations or support, but also to unlock collaborative conversations and share learning in headteacher meetings: "this isn't a dashboard of accountability, it's a dashboard of solutions" (Secondary Executive Principal).

The trust's work in primary has evolved somewhat differently, reflecting the merger with CPET, which had stronger capacity and expertise in the primary sector. Nevertheless, the primaries have also aligned in some areas: for example, following a successful pilot in one school, all schools have agreed to use the same phonics scheme. This was described as a "giant leap" by the primary heads:

Little Wandle is a really good example of everybody doing the same because it's the right thing to do and we know it works and there's enough expertise shared across the trust to make it work. And because everybody's bought in and everybody's been trained in it, it just works. **(Primary Head)**

The school leaders we interviewed were positive about Meridian's approach and it was clear that collaboration and relationships were strong. However, one school leader was honest about the challenges they had faced when they first joined and the time it taken to assimilate:

When [my school] first merged, I found it absolutely awful. And I was at the point of thinking… I'm going to have to go because it felt like everybody in core was desperately wanting a meeting about this, that and the other all the time. And that didn't feel helpful to me…. [it took almost] three years for me… [but] now I would say it's absolutely fundamental and it really takes the pressure off of us having those different services there. But it was a bit of a rocky road to start with.
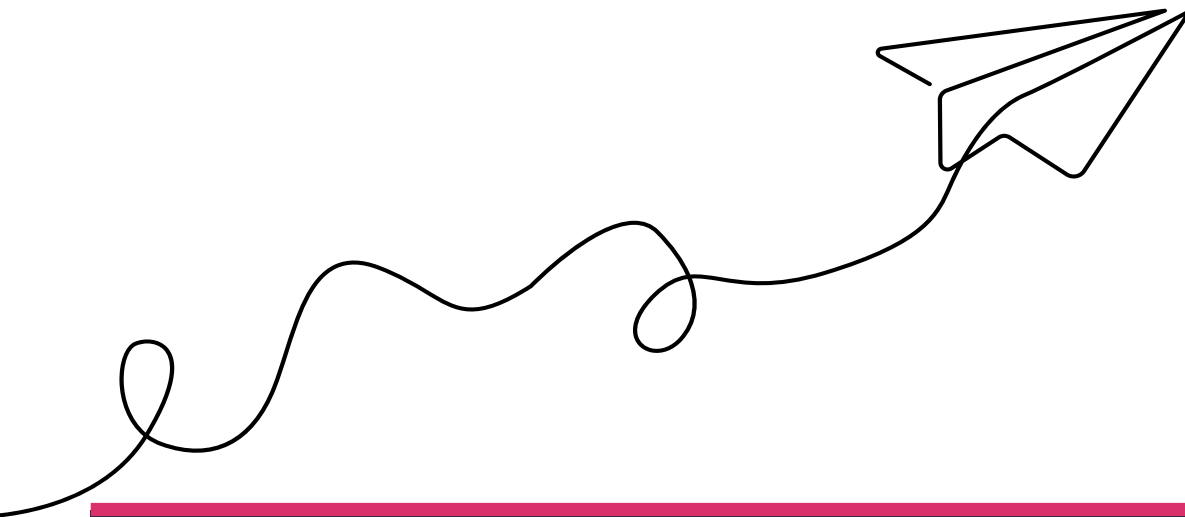
## Summary: navigating agency, autonomy and prescription

Figure 2 posed the following questions in relation to navigating agency, autonomy and prescription:

• How do we best balance the need for efficiency and QA with the need for agency, flexibility and/or innovation?

• What does successful co-design look like?

• To what extent do we have shared understandings, language and tools/systems – how does this enable collaboration?

• How well does our model reflect our beliefs about the nature of teaching and the need to adapt for contexts and cohorts?

Anglian and Meridian started in different places on these issues. Anglian's early commitment to school autonomy has shaped a "hard won" and continuing process of alignment, using the co-designed principles, blueprints and frameworks as resources. Meridian's initial commitment to a "marriage" and larger central team allowed for tighter integration from day one, although here too the process involved significant collaboration and co-design – at least initially. Today Meridian is described as having a 70/30 split, with school leaders owning 30% of decisions, while at Anglian one interviewee described themselves as "a principal… not head of school".

Our research did not allow for an in-depth exploration of how these models are experienced by teachers and wider staff in schools, but our interviews with heads and senior leaders across all five trusts revealed that the relationships between structure and agency are highly nuanced. While there might be an assumption that prescription will always reduce agency and that autonomy will always unlock it, our findings suggest that trusts must work to develop 'enabling constraints' which encourage 'agency within a framework'. This seems to require that:

• values are articulated, debated and used to guide decision-making

• shared concepts, language, frameworks and tools are collectively designed and regularly revisited, with an expectation that all schools and staff will adhere to them once agreed

• trust approaches to sensemaking, structural integration, knowledge mobilisation and wider aspects of organisational development reflect and reinforce a commitment to 'agency within a framework'

• professionals are equipped with the skills and resources they need and are then trusted to work flexibly in the best interests of children.
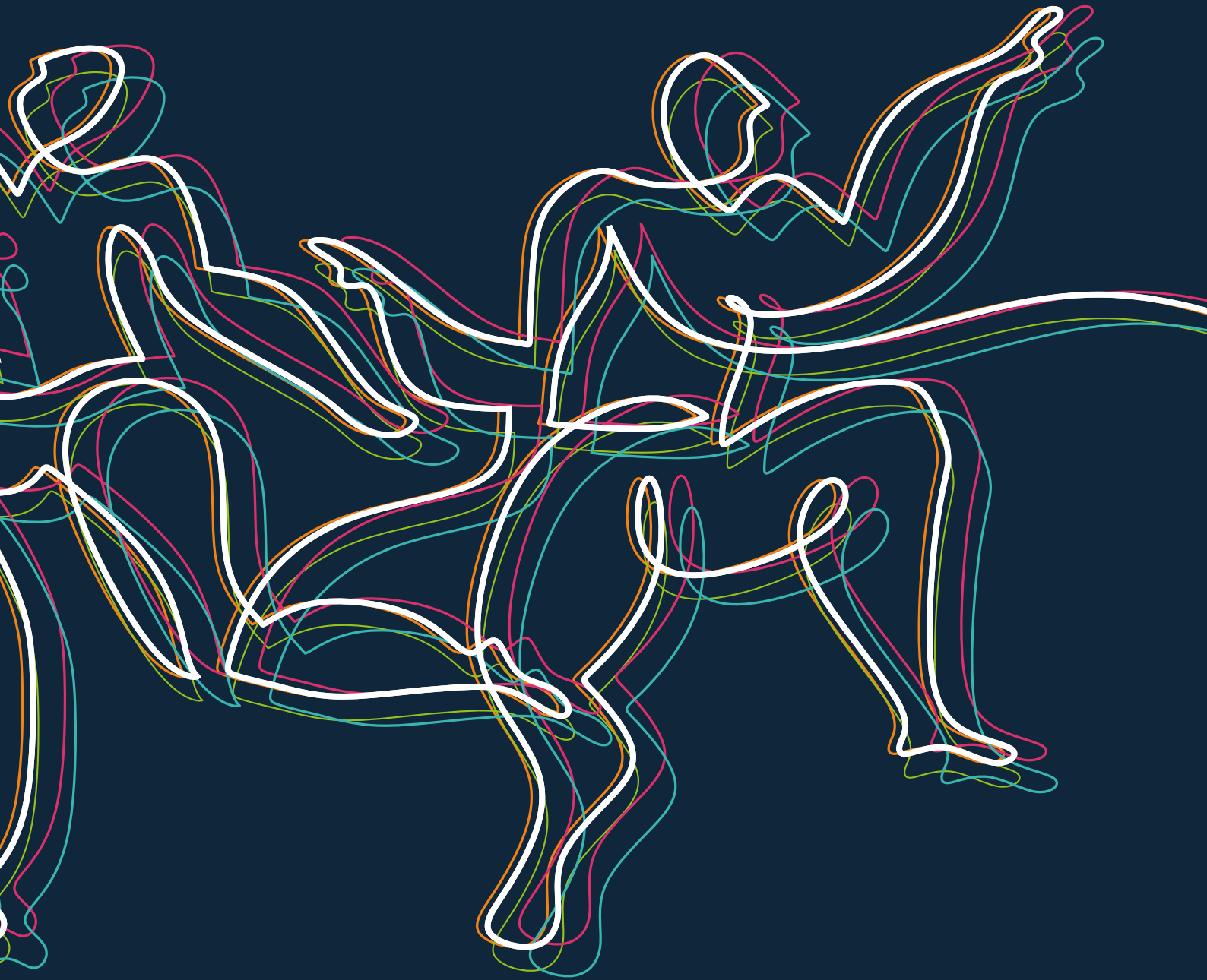
Conclusion

Courage and commitment in response to policy gymnastics

Working with a colleague, Helen Angell, we recently authored a chapter for a book on education policy in England between 2010-2024.[15] Our chapter explores the evolution of policy and practice on MATs, arguing that policymakers have engaged in policy gymnastics as they have sought to evolve the academy reforms in ways which address legitimacy concerns and offer scope for efficiency and effectiveness. We explore how policy aims and rhetoric shifted over time: from 'freedom', 'autonomy' and (single school) academisation in 2010, to efficiency and effectiveness via MATs from 2016 onwards. These shifts saw MATs repositioned: from a back-stop mechanism for supporting "the weakest schools" in the 2010 white paper, to a system-level model for all schools a few years later. Drawing on Jenny Stewart's work[16] we suggest that these gymnastics have involved strategic, linguistic and regulatory contortions, often driven by competing values and logics. Critically, these policy-level gymnastics have impacted on front line leaders and teachers, who have needed to educate children even as the system contorted around them. MAT leaders have been at the forefront of these changes, seeking to navigate an often-chaotic policy landscape and deal with relentless technical and regulatory requirements, while at the same time evolving sustainable models for engaging and supporting member schools.

These policy gymnastics have had numerous consequences. One has been that the early pioneers who established the first 'academy chains' to 'turn round' underperforming schools in the years after 2010 have had a disproportionate influence on policy and practice. Another has been that policymakers have rushed to define the features of 'effective' MATs and to develop trust quality indicators and regulatory frameworks, often despite a lack of rounded evidence on how trusts can work successfully and sustainably to support schools across different contexts. These developments have combined to place pressure on leaders to emulate the practices of dominant MAT pioneers, or face being excluded from official opportunities for growth and influence.

Unsurprisingly, many MAT and school leaders report feeling conflicted – pulled in different directions, but often away from their core values as educators. Sitting in a central office, MAT leaders often tell us they miss the daily interaction with children they had when they were in school. Instead, they must worry about growth, budgets, operations and the machinations of their regional Headteacher Board. Rejecting the pressure to emulate the MAT pioneers requires courage, and a commitment to core values and beliefs about education, inclusion and need for professionals to work flexibly to meet the needs of different contexts.

Conclusion (Cont.)

Leading values-based MATs: a constant dance

This research – although small-scale – helps to show that there is not one best way to lead a MAT. Trust leaders face a range of 'knotty' issues as they seek to develop their organisations in ways which align with their professional values and with their commitment to 'whole education'.

We show how five different trusts are grappling with four issues: sensemaking, structural integration, knowledge mobilisation and the need to balance agency, autonomy, and prescription. Each trust has its own history, context, values and priorities, meaning that each develops its own distinctive approach, but there are also common themes and approaches that all trusts can potentially learn from. Our key conclusion is that values-based leadership which accepts that trusts will never be perfect – not least because the world is continually changing around them, meaning they must always engage in the 'constant dance' - is essential.

None of this is unique to MATs. Organisational theorist Karl Weick, who is perhaps best known for suggesting that schools are loosely-coupled systems,[17] rejected the noun *organisation* in favour of the more active *organising*: his point being that 'the world – including both organizations and their environments – are being constantly enacted by individuals and groups'.[18] Weick and Sutcliffe[19] argued that:

> *If you live by rationality alone you lose options… Organisations are seen as more unified actors than they are, operating in more homogenous environments than exist, and capable of more uninterrupted action than they can in fact mobilise.*

This is not to say that MATs are never unified or that they cannot add value, but it raises questions about whether they should seek to become tightly coupled machines or should explore alternative metaphors (Figure 4) to capture an approach that is reliably adaptive.

Drawing out leadership implications for MAT leaders from this study, we suggest that the following themes emerge:

• **Values:** leaders in all five trusts were clear about their own values and the values they were seeking to instil, with a commitment to 'whole education' for all children and staff common to all

• **Sensemaking:** leaders acknowledged ambiguity, asking 'difficult' questions when necessary and were committed to drawing diverse colleagues and stakeholders together to reflect on collective experience and explore possibilities for new ways of working

• **Continuous co-construction:** these leaders were good communicators, but were also open to debate and differences of opinion, seeing co-construction as a core and continuing feature of their role

• **Epistemic communities:**[20] as they worked to navigate autonomy, agency and prescription, these leaders were skilled at working with colleagues to articulate shared values, concepts, language and tools which could provide a basis for ever stronger collaboration between staff and schools.
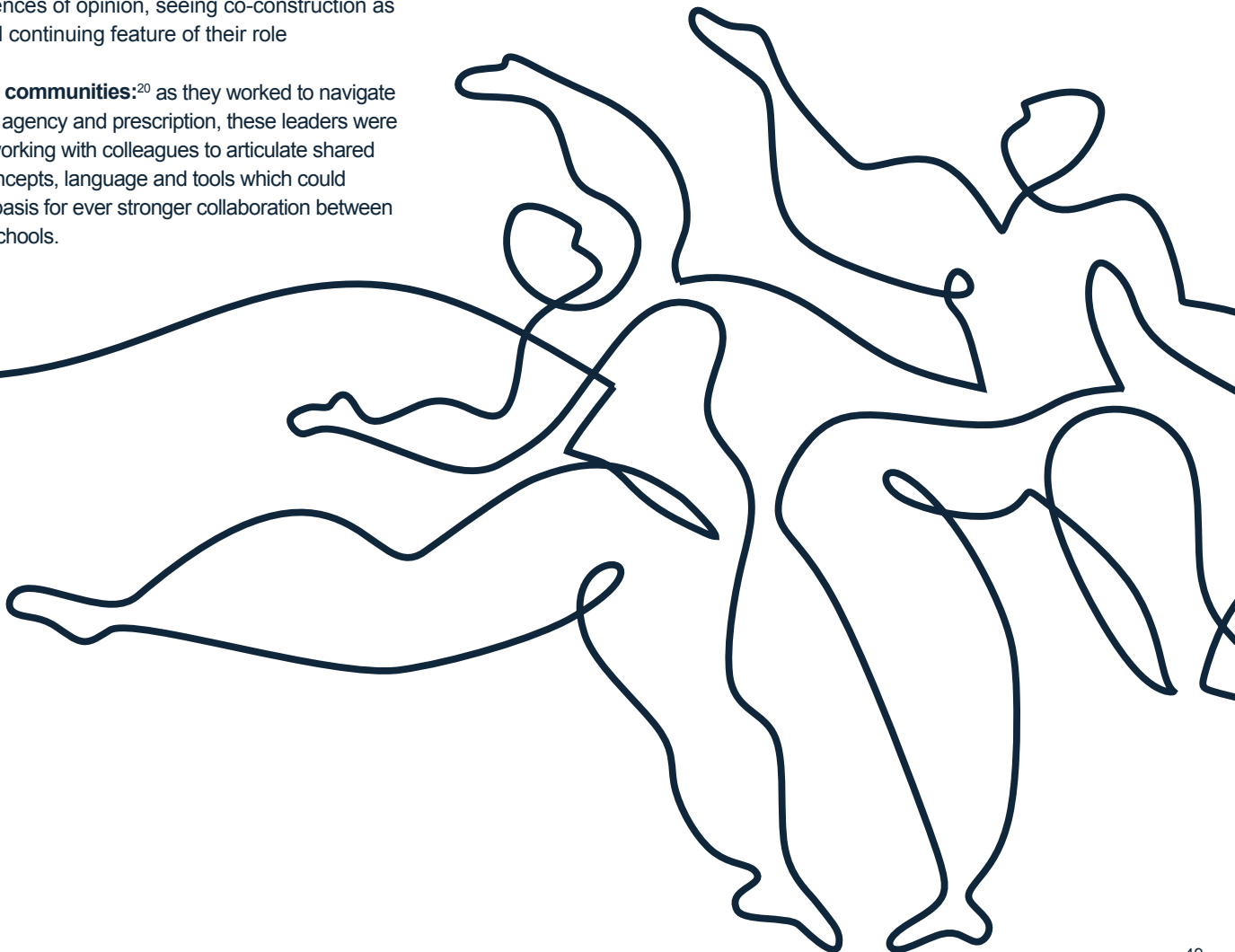
Endnotes

[1] The research received ethical approval from the University of Nottingham School of Education Ethics and Research Integrity Committee prior to the start of data collection. In line with ethics, we name the five trusts here but anonymise all participants as far as possible.

[2] The first study looked at the 'self-improving school-led system' reforms in England. The main report (Greany, T. and Higham, R. (2018) Hierarchy, Markets and Networks. London: IOE Press) included an assessment of MATs drawing on case study evidence and a national survey as well as the supplementary analysis. The supplementary analysis explored MAT impact using Propensity Score Matching: Bernardinelli, D., Rutt, S., Greany, T., and Higham, R., (2018) *Multi-academy Trusts: do they make a difference to pupil outcomes?* UCL IOE Press, London.

The second study included 23 case studies of MATs sampled by size (small, medium, large) and performance profile (above average, average and below average) and a national leadership survey: Greany, T. (2018) *Sustainable improvement in multi-school groups.* DfE Research report 2017/038. London: Department for Education.

Subsequent analysis:

• Greany, T. and McGinity, R. (2021) Structural integration and knowledge exchange in Multi-Academy Trusts: comparing approaches with evidence and theory from non-educational sectors. *School Leadership & Management*, 41(4–5), 311–333. DOI: 10.1080/13632434.2021.1872525

• Glazer, J., Greany, T., Duff, M., and Berry, W., (2022) 'Networked Improvement in the US and England: A New Role for the Middle Tier'. In Peurach, D. J. Russell, J. L. Cohen-Vogel, L. & Penuel, W. R. (Eds.) (2022). Handbook on improvement-focused educational research. Lanham, MD: Rowman & Littlefield.

[3] This version of the typology has evolved slightly from the version in Greany & McGinity, 2021: for example, 'community' has replaced 'institution'. This reflects ongoing dialogue with trust leaders at various workshops and events.

[4] Weick, K.E. (1995) *Sensemaking in Organizations.* Thousand Oaks, CA: Sage Publications.

[5] For details on Ron Berger and Expeditionary Learning see: https://eleducation.org/who-we-are/people/ron-berger/ For XP School in Doncaster see: https://xpschool.org/our-values-ethos/

[6] For a fuller discussion see: Greany, T., Pennacchia, J., Graham, J. and Bernardes, E. (2024) *Belonging Schools: how do relatively more inclusive secondary schools approach and practise inclusion?* Teach 1st: London.

[7] See: https://www.pioneereducationaltrust.org.uk/workwell/

[8] See Weick reference above. For a discussion of sensemaking in education/school leadership see: Eddy-

Spicer, D. (2019). 'Where the Action Is: Enactment as the First Movement of Sensemaking'. In *Educational Leadership, Organizational Learning, and the Ideas of Karl Weick: Perspectives on Theory and Practice* (Johnson & Kruse, Eds.). Abingdon: Routledge.

[9] According to Wikipedia: "the designation "skunk works" is now widely used… to describe a group within an organization given a high degree of autonomy and unhampered by bureaucracy, with the task of working on advanced or secret projects".

[10] https://schoolsweek.co.uk/trust-staff-go-on-strike-as-gag-pooling-row-escalates/

[11] Dr Ben Knight from the University of the West of England introduced this terminology in a Whole Education trust network workshop held in Warwick, in June 2024, which explored teacher agency.

[12] For example see: Nguyen, D., See, B., Brown, C. & Kokotsaki, D. (2023) *Reviewing the evidence base on school leadership, culture, climate and structure for teacher retention*. London: Education Endowment Foundation (EFF).

[13] See also: Greany, T. (2024) Moral Purpose in Performative Times: Do School leaders' Values Matter? *British Journal of Educational Studies.* 72/5, pp 587-606 https://www.tandfonline.com/doi/full/10.1080/00071005.2024.2374074#abstract

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