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**Opening Speech to the #MATLeaders National Conference:
Improvement & Innovation at Scale**

27th September 2018, Sheffield

Good morning.

Thank you, Jane. And can I begin by saying how honoured we are that Jane is an associate of Forum Strategy. She is someone who has inspired me and encourages me enormously as CEO of Forum Strategy. She is a deeply principled and experienced thought-leader, and someone who has made an enormous contribution to school leadership development in this country.

Thank you for being here to guide us today, Jane.

And welcome to you all to our first annual national MAT leaders' conference.

It's a source of real pride to finally see all four networks together in the same room; after one and maybe two years now of operating regionally. It is good to see so many CEOs, Chairs of trustees, senior leaders and also friends and colleagues who are contributing to today's conference. It's also important to me personally as this week marks Forum Strategy's fifth anniversary as a company – a

momentous milestone for any leader, and certainly for a start-up organisation.

The best learning, the best source of support, the best ideas come from our peers not from government agencies, leadership programmes or academic papers. That is especially true for CEOs – as a whole body of research now tells us. There is wisdom in the crowd.

And – as you will see today, and I'm sure have seen through the regional networks – those peers include not only those leading and chairing MATs, but also those peers in the wider world – cross-sector organisations; and there is a real emphasis on that today. We have colleagues from the hospice sector, the police, from business and from health. All ready and enthusiastic to share with you, and learn from you.

This isn't a conference of the usual suspects.

Indeed, I don't know quite what to expect. That's why I'm glad Jane is here!

It's also very good to be here in Sheffield, at the very heart of the country, and indeed, the Northern Powerhouse. This is no London-centric movement.

We are in a city defined by steel – something you certainly need to have a bit of to be a MAT CEO in 2018.

A city defined by rivalry of teams playing the same game – something we're trying to move away from in the MAT sector, no doubt.

Genuine MAT to MAT collaboration is the name of the game. But this is a city that thrives on a little healthy sporting competition, and that's no bad thing.

And a city defined by that superb film, 'The Full Monty' – well one or two MATs have certainly been caught with their trousers down! (Not any MATs in our networks – or indeed, in the room today - I must add! This is a group of leaders as learners, and that counts in this world.)

So, it is good to be here in Sheffield. A city I personally consider to be my favourite in England. Thank you to Brammall Lane for hosting us.

SLIDE

The conference today is themed around Improvement and Innovation at scale. I want to talk a little bit more about that important and pertinent theme in a moment.

Before I do, I want to talk about the current context for the academy trust sector.

And it's a peculiar time – I think you'll agree – in terms of political leadership and direction for academy trusts.

The National Schools Commissioner has gone. An interim commissioner is in place. And – according to a Regional Schools Commissioner I heard speak at a conference earlier this month – the future is up for consideration. I'm told that we will see the next phase begin in April, but what that new phase looks like is still anyone's guess.

Will we have a new NSC? I'm not sure. The DfE says we will, but why not get on and recruit one now? Things feel up in the air – and that's not good for you or the sector.

And then we ask where does the Secretary of State really stand on academy trusts and their future development and improvement? I don't think anyone is sure on this yet either. Perhaps next week's Conservative Party Conference will shed more light, not least after the disrespectful tone of the Labour Conference, which has left many hard-working and deeply committed leaders, teachers and volunteers a little despondent to say the least.

What is clear is that we are long overdue for thoughtful policy making and more strategic investment in the development of the MAT sector.

On the retirement of the National Schools Commissioner earlier this month, we published a blog which received thousands of hits, and then a piece in Schools Week only two weeks ago, which set out where the system was struggling and where it needed better investment and policy.

I want to share those thoughts briefly with you now.

There is a beauty in three, there are more, but these are priorities as we see them based on dialogue – mainly – with you, dozens of CEOs and Chairs across our networks.

1. Trust governance

Academy trust governance is a really rewarding, but also a demanding task. We're not in the realms of a school governing body here, we're in the realms of corporate governance – where duties under charities law, company law, and of course, accountability to high political offices is the order of the day.

The organisations you lead and serve are multi-million-pound organisations with a responsibility – first and foremost – to serve the public. This isn't a place for amateur governance or leadership.

Yet, where we have seen academy trust failure, be it around school improvement, finances, or organisational compliance, you can almost without fail trace the issues back to insufficient knowledge, engagement or challenge amongst trust boards. In some of the most extreme case you can trace it back to sheer negligence and malpractice.

This is the big blind spot of the MAT system.

Trust boards should be the frontline of accountability in the MAT system. Instead, rather than invest in the recruitment, induction and training of trustees to a serious degree over the past few years – bolstering that frontline, the DfE has built an army of civil servants to oversee the system, yet they are still stretched and too many of them are being moved around to other Departments or Brexit, rather than developing depth of knowledge and understanding.

It's been a reactive, rather than a proactive approach for investing in the long-term.

So our message to the DfE is to stop putting greater onus on civil servants, and instead to equip trustees and trust boards better.

Give trustees and boards the funding to choose from the plethora of training available in both the education sector and beyond. Not just the usual suspects. Create initiatives to encourage people to become trustees – not necessarily through money, but through the gift of time.

I know some MATs have been able to bring together really effective trust boards. However, still too frequently I see boards where:

- The CEO is driving it; (and that's far from ideal)
- The trust has not built scale and engagement with its communities to draw in talented people to serve as trustees

- There is confusion as to the roles and responsibilities at different levels of trust governance
- There can be perceptions of conflicts of interest
- There is not enough awareness of what sustainable growth of an organisation looks like

As an organisation we have put our money where our mouth is, and in the last year we have designed, developed and rolled out external reviews of trust boards (all entirely self-funded); these have a strong reference to the legal requirements, the best corporate practices, and lessons from the successes of academy trusts.

These are the areas the reviews cover...

SLIDE:

Vision and strategy

Accountability and reporting

Training and development

People and relationships

Structures

Compliance

But, however good the training and external reviews; there needs to be better investment.

This will give boards the funding, capacity and understanding to fulfil their duties.

We need all trusts, not just some, to benefit from the highest standards of corporate governance. But just as importantly, we also need values-based governance. There needs to be a strong message here. Those people who have been found to be responsible or complicit in the failure of MATs due to proven mismanagement or negligence should not be allowed to govern trusts or schools again. If we were in the Charities' sector, some of the practices that are alleged to have taken place in this minority of MATs would result in disqualification from being a trustee or director, and so it should be in education. The DfE needs to replicate this strong position in the academies sector.

What those minority of trustees and leaders are alleged to have done undermines your ability to attract and retain talented volunteers and talented professionals who want to do the right thing, who want to build a legacy that serves children and young people, and, of course, maintain their reputations.

I am shocked when I hear that there are still trustees of failed trusts that are operating or attempting to operate trusts and schools in our education system.

The DfE should look at policy in this area and protect the reputation of trusts, trustees, and sector from those who have undermined it once so that they can never do so again.

It's simple stuff and models the standards and expectations we all have for MAT governance.

2. Thought leadership

Another area I think the sector is missing is the thought-leadership.

I don't think the DfE has done well enough in engaging you, as CEOs, to inform the development of policy and to help shape the system.

Policy has often been developed in Westminster and spelled out later. That isn't how a sector made up of multi-million pound organisations and many of the most experienced practitioners in the land should be engaged with.

One of the areas I'm really proud of in delivering these networks is the policy roundtable events we've run – with involvement of so many of you, with Ofsted, with NGA, and others...

The reports, which provided recommendations for areas such as what the inspection of trusts should look like in practice, and how we could achieve better transparency and accountability of trust members, received press coverage.

SLIDE: List of roundtables and next roundtable, with press coverage images

I'm very pleased that Matthew Purves from Ofsted is speaking here today, and will be providing us with an update on the inspection front.

There are many nuances and sensitivities around what an inspection framework for MATs could look like, and how the capacity would be generated... but I think we are clear that something needs to happen. At its best Ofsted generates confidence in the public and provides leaders with a source of intelligence and insight for improvement. I truly believe that this Ofsted leadership can get the MAT sector to this point but, again, it must engage and work with you – the experts – to make this happen. Lessons should be learnt from the journey that organisations like the CQC have been on in relation to hospital trusts.

I also think there simply are not enough resources, materials and toolkits to give boards and CEOs the guidance they need.

The NHS has a wonderful body called NHS Improvement – the sector needs something like that. They have an Expo each year on what improvement and innovation looks like. If this sort of thing doesn't come from government, we need to create it and I am ready and willing to ensure that Forum Strategy works with you on that.

But let's see where the political landscape takes us.

3. The vision for what success looks like

I think one of the amazing things about a profession-led sector, and the greater autonomy academy schools and trusts have, is to respond to the world in which we live – on behalf of children and young people.

Exams matter

Qualifications matter

The compliance and adequacy of schools matters

But this should not be the only way we define MATs and the MAT system

League tables of MATs will narrow how success is defined, it's inevitable.

Yet that's the DfE's only solution so far.

League tables of MATs will discourage collaboration at a time when it is most needed.

That's inevitable too.

We can't afford that when the system is still in its infancy.

I would like to see MATs judge their success by how well they are responding to the complex and crucial challenges of our time.

Yes, be absolutely focused on highest standards of literacy and numeracy and strong qualifications, but also providing pupils with the best educational experience and the best preparation for their lives ahead. A MAT sector that opens itself up – to the communities it serves – and being accountable for:

- Happy and confident children – and by that I mean all children – in a country where, according to the OECD, children’s life satisfaction is amongst the lowest in the developed world;
- Healthy children – through physical education and a safe environment. At a time when childhood obesity is at record levels and children are spending less time outside than ever;
- Children who are masters rather than servants of technology (the defining challenge of our age);
- Staff who are motivated and inspired to give their best, and who feel invested in – and who positively chose to work for academy trusts because they are incubators of talent.

I really want to see this commitment being generated by MATs themselves through making themselves accountable to the people who matter, their pupils and their communities. Not simply to an Ofsted framework or a league table of data.

Indeed, in our conversations with Ofsted, it was clear that the MAT leaders involved wanted Ofsted to place an expectation on MATs to ensure they were more accountable to their communities and pupils; demonstrating intelligent accountability. That’s for you to shape, not them.

So those are some hopes and dreams.

I now want to talk a little more about the challenges you face as academy trust leaders and to be frank – where some MATs need to take more initiative in the face of some key social and economic trends taking place.

Again, I'll stick to the beauty of three

SLIDE

Becoming an employer of choice

As our Marketing and Resources Manager, Rachael Gacs, blogged over the Summer, recruitment and retention is probably the biggest strategic risk facing academy trust leaders and the sector generally.

It's a bigger issue than the tight finances in my view; although back to that in a minute.

And its an issue that is not confined to education.

KPMG's UK CEO Outlook 2017 found that recruitment will be CEOs' top area of investment over the next 3 years, with 77% saying they will invest highly in people.

The ONS confirms that job vacancies have risen by 14,000 to 833,000 - a record high! The BCS describes this as 'alarmingly high' as the #WarForTalent rages across the economy.

I honestly believe the MAT model provides a far better platform than individual schools to recruit and retain talent -

Beyond money, the new generation of graduates want to work for organisations that have influence and make a difference, that can provide them with genuine CPD and leadership opportunities – across contexts, and they want mentoring from the best people in their fields. Really good MATs do all of that, although few are promoting it any where near as well as they could be.

But, more than anything, studies have shown that the expectation of this generation is for flexibility.

Many other sectors are really investing time, thought and money into how they create more flexible workplaces and working practices. They know this is key to any strategy to recruit and retain the very best talent in the coming decade.

That's hard for schools. You are confined by the school day and the timetabling challenges you have. But in MATs you have some freedom and some adaptability because of your scale. It's something I would urge you to invest time and thought into now. We are very much committed to helping to find some answers in the coming months, drawing on research and practice out in the sector.

So, MATs are generally proving themselves to be employers of choice. But you need to market it, and market it well, because this battle for talent is the most important one.

The financial climate

No one needs any introduction to this.

What I don't want to do is moan about the DfE here. That's out of our control, and to some extent there are so many calls for better funding across the public sector.

But the financial crash of 2008 changed everything. A growing aging population changes everything. Growing demands on public services changes everything. Brexit changes everything. The tighter public funding budgets will not go away. We need to find better ways of generating and maximising resources, not simply to cut across the board or live in hope for more cash later.

That is why I am concerned about the *bean counter v. investor* mentality that is emerging in the sector right now.

I see some trusts doing some impressive work here because they are not simply looking at economies of scale and cutting costs – important though that is.

If MATs are simply about keeping costs down, that loses sight of their role in maximising resources so that the highest standards of provision are available and to solve some of their strategic challenges in doing so.

I see trusts addressing the enormous costs of supply teaching by upfront investment in their own supply banks – also improving quality of cover teaching in the process. Supply is probably the biggest source of waste in our education system and rarely adds value.

I see MATs (not least a SAT represented in the room) running chains of nurseries to help generate central team and school improvement capacity, but also to secure a strong start to their children's education – bridging the gap between pre-school and school.

I know trusts providing healthy catering to other local schools, nurseries and – indeed – other public sector organisations. Generating income and fulfilling their commitment to giving all children the healthiest start.

And I see trusts jointly – together – commissioning CPD and expert practitioners such as educational psychologists and resources such as swimming pools.

And I see trusts getting savvier at bidding for money beyond the obvious DfE funding pots – usually drawing on bid writers, including those in our own team, on a part-commission basis. As all of you who receive our fortnightly briefing know, there is a lot out there that sadly most schools don't even know about never mind get chance to bid for.

This isn't easy stuff, you are essentially still running start-up organisations, but that also brings opportunity for values-based, entrepreneurial leadership. Together at least I think MATs can make some of this possible and – to some extent – buck the trend through the investor rather than the bean counter mindset, whilst also getting as much value from external suppliers.

Improvement and Innovation At Scale

And so, number three, the focus of today's conference.

Generating improvement at scale is not the same as generating improvement in a single or a handful of institutions. This is not the LLE or NLE model we are talking about here.

Today we are talking about the CEO as the enabler of improvement, creating the organisational vision, capacity, habits, behaviours, and – yes – metrics, to ensure improvement is scalable and sustained. Supported, of course, by the Chair and board.

This is a real mindset shift. The tricky transition from being the lead practitioner to also being the corporate leader.

It is a transition that has led to many failures, but, as we will see today from both within and beyond the MAT sector, to the fulfilling of enormous potential.

Ultimately, you have all created multi-academy trusts to extend your moral purpose, and make a difference to not simply hundreds, but thousands of children – and to do so in such a profound way. Today's complex challenges and opportunities faced by children and young people – the mental health issues, the technological change, the new world of work, etc. – can only be met by using scale that brings about partnership, expertise and influence that transcends the organisation and the profession.

This year we have been rolling out our seven pillars of improvement at scale.

These are principles rather than prescriptions and all allow MAT SLTs and boards to self-audit their progress towards improvement at scale, whilst maintaining a very context sensitive approach to putting them into practice...

SLIDE: Forum Strategy's Seven Pillars of Improvement at Scale

- **A clear, child-centred Vision**
- **Capacity**
- **Collective Commitment**
- **Real time and robust intelligence**
- **Process and project management**
- **High quality improvement activity**
- **Quality assurance**
- **The thinking and the audit- questions can be found on our website.**

Indeed, - on the cross-sector theme - the seven areas align very closely with new research earlier this month by the Care Quality Commission – on improvement in hospital trusts.

I often call improvement at scale the holy grail of academy trust leadership, and it is – like governance – something that seems to define the successes and the failures of the MAT system.

So that is a very rapid canter through where we – as an organisation – see the MAT sector at the moment. And that is – as I said at the beginning – very much informed by you.

I want to end with a quote that someone shared on twitter just last weekend....

SLIDE

“The CEO’s job is to conduct the orchestra to shape the sound.”

I think that applies even more so to you as CEOs than it did when so many of you were heads. You are enablers of talent and resources – generating **improvement and innovation for thousands of pupils; that is the true purpose of academy trust.** You are also – and this is where I don’t forget the Chairs in the room, accountable because of that privilege.

Today we're going to hear from a number of successful and fascinating conductors who have been on leadership journeys that are of interest to all of us.

And as conductor of the MAT networks I want you to keep pushing me and Forum Strategy to give you the best, to keep pushing for better policy and thinking, and – most of all – to remain a place of support and, I hope, inspiration.

Enjoy the day, and here's to the next five years.