

# Effective MAT governance

## Unit 2: Organisational identity, vision and strategy

### One organisation

In order for the trust to fulfil its charitable object or purpose of advancing education for public benefit, it is tasked by the DfE with carrying out three core governance functions:

1. Ensuring clarity of vision, ethos and strategic direction
2. Holding executive leaders to account for the educational performance of the organisation and its pupils, and the performance management of staff
3. Overseeing the financial performance of the organisation and making sure its money is well spent

The responsibility for carrying out these functions falls to the board of trustees with the board accepting that the organisation is one entity and as such is responsible for all the children and all the staff in all the schools operated by the trust.

This means:

- Not treating one school more favourably than others
- Being on guard against a 'my school' mentality – either real or perceived
- Not promoting a lead school even if one school has sponsor status or where the CEO was the headteacher

### Establishing an identity

From its inception in order to establish an identity, trusts have to determine:

- their name ... and most trust's give consideration to the message this gives about the trust aspirations and / or values
- if they will have a logo and / or house style ... and again, most trust's give careful consideration to what this says about the trust
- their stated mission or purpose which is often in the form of a strapline which captures the key message they wish to give

Trust's which do not establish a strong identity tend to lack coherence, existing as a collection of schools which happen to have access to shared services. Typically they possibly exhibit disparate upward reporting which makes it harder for the board of trustees to hold them to account for their performance.

### A trust wide vision and values

For an organisation to remain dynamic and successful, it should have clearly stated values and a clear vision for what it wishes to achieve and MATs are no exception. Many MATs have settled on bland statements which make clear that they are looking to do their best for their pupils, allowing their schools to build on these with more specific school values and visions which can easily encompass the trusts. But increasingly MATs are thinking more strategically about the sort of organisation they wish to be in the next three to five years both in terms of standards, sustainability and reach. These trusts have vision statements which make clear the sort of people they aim for their pupils to become, and with what educational outcomes, what their approach to financial sustainability is, and their plans for

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growth. In these trusts, all the schools are tasked with working together to meet these stated aims.

### A trust wide strategy

In order for an organisation to achieve its vision, it needs a well thought out strategy. This will involve senior executive leaders working alongside the trust board to determine key areas that they must prioritise for development in order to reach their stated aims, and in the agreed timescales. Once these priorities have been agreed, the changes that will have been made (the success criteria) should be clearly identified so everyone will be able to tell if that priority has been successfully achieved and if it achieved what was expected. So that priorities do not fall by the wayside, milestones which can be reported against should be identified. These act as a check that the journey to achieving the stated aims is on track to succeed.

A MAT wide strategy will nearly always include a priority associated with improving its schools pupil outcomes. This means that the MAT's strategy must be made known and available to the schools in the trust. It may be that there are also priorities associated with finance policies such as a trust wide school improvement policy or reserves' policy which will impact on school budgets. If there is a growth strategy which involves school to school support, the trust CEO may wish to work with the school offering support to ensure that its strategy and operational planning recognises the impact this will have on the management of the school.

Trusts without an ambitious strategy for the organisation as a whole tend to be the ones which are less successful and find themselves more vulnerable to being blown off course by events.

### Being ambitious can mean taking risks

The Academies Financial Handbook requires all trusts to establish a robust risk control framework. MATs should consider carefully if their vision and strategy is trust wide, if this will inform their approach to risk i.e. if it is a trust level approach or if their schools should be assessing risk in the same manner so that everyone in the trust is aware of the risks, and how they are being mitigated.

### Useful resources:

[Risk management guidance and template risk register](#)

[Being Strategic: a guide for boards and leaders](#): The guide explains how strategic priorities are identified, resourced and monitored. It also gives useful advice on:

- vision setting
- self-evaluation and risk assessment
- communicating the strategy to stakeholders
- creating the right culture for the strategy to succeed