

# Being Strategic

Developing a strategy to deliver your vision

A guide for multi academy trust  
boards and CEOs

June 2023



# Definition of terms

## Academy committee

The local tier of governance in a MAT, sometimes referred to as local governing body

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## CEO

The senior executive leader and accounting officer in a MAT

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## Culture

The way things are done

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## DfE

Department for Education

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## Ethos

The characteristic spirit of a community as manifested in its attitudes and aspirations

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## Headteachers

Those leading schools in the MAT

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## LA

The local authority

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## MAT

Multi academy trust

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## Mission

Declaration of core purpose

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## Operational

Day-to-day management and delivery of the strategy

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## Regional Directors

Act on behalf of the Secretary of State for Education. Their main responsibilities include addressing underperformance in schools and decisions on the creation, consolidation and growth of MATs

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## SAT

Single academy trust

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## Scheme of delegation

The document that explains the governance structure of the MAT and sets out who carries out which governance function and makes decisions

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## Stakeholders

Interested individuals and groups who are crucial to the success of a MAT.

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## Strategy

Sets out the priorities needed to achieve the vision

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## Trust board

The accountable body for the MAT

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## Values

Principles that guide actions and behaviours

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## Vision

Describes what the MAT wants to achieve

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# Foreword

## Welcome to this guide to being strategic, for those governing and leading a MAT.

This guide is about ensuring clarity of vision, ethos and strategic direction. It encourages collaboration and engagement when developing a strategy from first principles – your values, your ethos, and what are you trying to achieve for your pupils.

Previous versions of this guide have applied to all types of state school structure. This version has been produced for trustees and CEOs and is focused on developing a strategy for the MAT as a single organisation and implementing the vision across schools. It recognises that whilst there may be a common vision, the improvement priorities of individual schools will be different. Therefore achieving the correct balance between embedding values and strategy across the MAT, and being responsive to the needs of individual schools, is key to being successful.

Whether you are a trustee, a CEO or part of an executive team, we hope that you find this a useful guide to strategy development. Please visit [www.nga.org.uk/contact-us](http://www.nga.org.uk/contact-us) to share your feedback.

A separate version of *Being Strategic* is available for local authority maintained schools, federations, SATs and those leading and governing at schools within a MAT.



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# Introduction

## Strategy is a key aspect of governance.

**“Strategic Governance operates an effective and robust governance structure that involves schools and exemplifies ethical standards... Has a strong local identity, engaging effectively with parents and the wider community.”**

Opportunity for all – education White Paper, March 2022

Trust boards work as a team to:

1. set the vision and strategy for the MAT
2. hold leaders to account for the operations and performance of the MAT in line with the vision and strategy
3. oversee relations with stakeholders and the involvement of parents, schools and communities so that decision-making is supported by meaningful engagement

The Department for Education has published Trust [Quality descriptions](#), which are intended to aid strategy development in a MAT and inform improvement and capacity-building priorities. The descriptions cover high quality and inclusive education, school improvement, workforce, finance and operations, and governance and leadership.

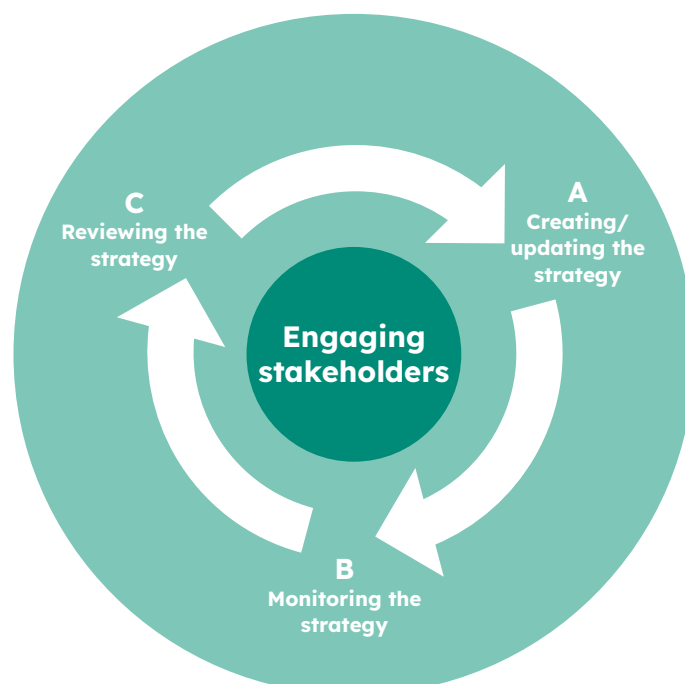
This guide draws on those areas and provides trust boards and CEOs with a framework that they can use to develop, monitor and communicate their strategy within an annual cycle:

This guide also encourages trust boards to involve the local tier of governance (academy committees) in a meaningful way to help shape the vision and strategy for their MAT. NGA champions local governance in MATs because it provides:

- informed strategic thinking and decision-making
- a positive contribution to the checks and balances of MAT governance
- more diverse views adding to the richness of discussion and challenge
- an understanding of the MAT’s role, structure and how individual schools fit within it
- more active engagement between the school and its wider community
- a local focus on accountability and a local connection to the MAT

These areas are explored in depth in the research report [Local governance here and now](#), published by NGA in May 2023.

## The continuing strategic cycle



## Who develops the strategy?

Trust board	CEO	Both
Chair leads the board to set and champion a clear strategy for the trust, which aligns with the trust's charitable objects, covers all pillars of trust quality and, where applicable, sets out its aspirations for growth over time.	Leads the trust executive leadership team to create and implement an effective trust operating model, with clarity about the delivery of trust-level and school-level activities, that aligns with the strategy.	Review progress rigorously to ensure strategic alignment and effective implementation.

Source – Trust quality descriptions, April 2023

Joint [guidance](#) published by NGA, NAHT and ASCL explains how the trust board and CEO work together to:

- articulate the vision
- identify priorities for achieving the vision
- agree a strategy that aligns with available resources
- monitor progress within an annual cycle

A template strategy document is included as an appendix to this guide.

[The Framework for Ethical Leadership in Education](#) provides principles, to support ethical decision-making and challenge unethical behaviour. Trust boards should also have a code of conduct and adhere to the Nolan principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.

## Implementation

The strategy is implemented through the CEO's oversight of MAT operations and fulfilling the role of accounting officer. Effective monitoring by the trust board will provide assurance that:

- plans align with the strategy
- ownership and responsibility are clearly defined
- implementation is supported
- implementation is linked to performance management

## Away days

Depending on the size of the MAT, it may be useful to have either an annual conference or 'away day' involving trustees, academy committees, executive leaders and headteachers to develop and review the strategy.

Such events are proven to strengthen relationships and the sense of belonging to the MAT, as well as providing greater insight into perceived strengths and areas for development.

# Start with values and vision

## The values the MAT lives by should influence the vision for its future.

There is no need to set values or write a new vision every year. However, it is important to review, reaffirm and make changes where necessary. Some MATs appoint a small group of trustees and members of the executive team to work on developing their values and vision in collaboration with their schools and academy committees.

### Values

The trust board should foster a common set of values and an ethos reflected in the policies and practices of the MAT. When the values are clear and are clearly communicated, they are likely to become embedded in daily interactions and flourish within a school's unique character.

Whilst approaches may differ, it is important that every board and leader has clarity when it comes to what their values mean and how they should be implemented.

#### Questions to prompt discussion about values

1. What values should the MAT be known for and live by?
2. Why are these values important – where do they derive from?
3. How do the values resonate across the MAT – with schools, parents and communities – what evidence is there?
4. How are schools and academy committees supported to embed values across the MAT?

### The vision

Every successful organisation has a clear vision; therefore, the vision needs to be taken seriously as it is far more than just a statement for the website.

Whereas in broad terms the mission statement defines the reason for existing, the vision conveys, in a few sentences, the trust's ambition for the future. The vision should be a point of reference for discussing the curriculum and the educational experience pupils receive.

#### Schools and MATs with a religious character

In schools and MATs with a religious character, 'mission' and 'vision' may have different, specific meanings depending on their context. We recommend that those governing and leading schools with a religious character seek the advice of the religious body to support the development of their vision and also refer to relevant underpinning documents, such as those included in the list of resources on page 17.

#### Questions to prompt discussion about the vision

1. Does the vision align with the values of the MAT?
2. Is the vision compelling enough to drive development and growth?
3. Does the vision convey the ambition for the MAT and the communities it serves?
4. Does the vision convey what success means in the context of the MAT?
5. Does the vision align with the available resources?
6. Is the vision compatible or at odds with local and national policy?
7. Do the values resonate throughout the MAT – with schools, parents and communities – what evidence is there?
8. How are the MAT's schools and stakeholders involved in shaping the vision?

# Use self-evaluation and feedback

## Self-evaluation

Conducting SWOT (strengths, weaknesses, opportunities and threats) and PESTLE (Political, Economic, Sociological, Technological, Legal and Environmental) analyses allows those leading and governing to assess:

- how the MAT is performing as a single organisation
- how the needs of individual schools are identified and met
- how all pupils are performing
- how the MAT supports and influences the communities it serves
- what the MAT brings to its schools and communities
- the MAT's contribution to the wider system
- the main strengths and weaknesses of the MAT
- how resources are deployed and optimised
- current and future capacity
- risks to future success and sustainability
- opportunities to develop and grow

## Stakeholder engagement

Trust board	CEO	Both
Oversees strategic relationships with external stakeholders.	Communicates trust's strategy, plans and achievements to stakeholders.	Involve parents, schools, communities and, where appropriate, dioceses and other religious authorities so that decision-making is supported by meaningful engagement.

Source – Trust quality descriptions, April 2023

Giving stakeholders a role in developing the vision and strategy enhances legitimacy and creates a shared sense of ownership and purpose.

An effective way of ensuring stakeholder voices are heard, especially in larger and dispersed MATs, is to give academy committees a clear and specified role in the stakeholder engagement process. Giving academy committees a clear and tangible role in the engagement process is an effective way of ensuring that stakeholder voices are heard, especially in larger MATs.

**MATs with a religious character should recognise the relevant religious body (often the diocese) as a body to which they are accountable, rather than as a stakeholder.**

## Feedback methods

- consultations
- pupil voice
- surveys (including staff exit interviews)
- online forums
- open days
- attending family and community hubs
- maintaining relationships with local organisations
- peer to peer networks
- participation workshops

# Identify strategic priorities

Self-evaluation helps the board to establish where priorities lie and identify a limited number that impact most on achieving the vision. Limiting the number of priorities makes progress easier to monitor and impact easier to evaluate.

## Questions to help identify strategic priorities

Select from the following and tailor to fit the context of the MAT.

### The MAT as an organisation

- How effective are central services at:
  - supporting all schools and building capacity
  - supporting schools to improve
  - ensuring financial probity and compliance across the MAT
  - providing an efficient and cost effective service across the MAT
  - anticipating and responding to risks across the MAT
  - seeking economies of scale
  - optimising resources
- What is the projected financial position medium to long-term?
- What are the priorities for ensuring financial sustainability: generating income, optimising resources and or making efficiencies?
- How healthy is the MAT estate – is it fit for purpose over the next 5 to 10 years?
- What are the priorities for ensuring the MAT manages its estate in a sustainable fashion?
- What are the priorities for supporting any schools in the MAT which have PFI contracts to manage?
- Is the structure and makeup of the leadership team conducive to delivering improvement across the MAT?
- Is the balance right between central strategy and accountability and individual school autonomy?
- Is good practice shared and celebrated across the MAT to further the vision and strategy?
- Are policies consistent and aligned throughout the MAT?

- Are policies inclusive and informed by ethical decisions that help everyone?
- How can governance be improved according to self-evaluation and external review?
- Does the MAT scheme of delegation accurately reflect:
  - the values of the MAT
  - where decision making responsibility rests at executive and governance levels

### Staff

- Does the MAT attract, develop and retain the staff it needs?
- How diverse is the workforce at all levels against established indicators?
- How do employees view the experience of working for the MAT?
- Does the MAT make the most of its single employer status?
- What are the main workforce challenges across the MAT?
- How does the MAT build and maintain a reputation as a first-class employer?
- Are staff/HR policies consistent across the MAT?
- Do staff/HR policies promote sustainable workloads, wellbeing, flexibility and a positive workplace culture?
- Does the MAT offer CPD and career pathways for staff?
- Is succession planning used to reduce the risk of staff who leave?
- Does planning and delivery across the MAT align strategic priorities with the needs of individuals?

### School improvement

- What are the priorities for school improvement across the MAT?
- Are the priorities consistently stated in MAT-wide and individual school plans?
- Is a quality curriculum, teaching and assessment provided across the MAT?





4. Is there sufficient capacity for supporting individual schools to improve?
5. Are individual schools supported to identify their specific improvement priorities using the right data and other metrics?
6. Are headteachers supported to develop measurable improvement plans with clear lines of accountability?
7. Do academy committees provide sufficient challenge and support for school improvement across the MAT?
8. Is school improvement data credible and used consistently to inform ongoing improvement?
9. Is targeted support deployed effectively to support vulnerable schools in the MAT?
10. Are the processes for identifying and meeting the needs of vulnerable pupils consistent across the MAT?
11. Are safeguarding policies and procedures effective and applied consistently across the MAT?

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### Stakeholders

1. Which stakeholder relationships are of most value to the MAT?
2. How are stakeholders informed about:
  - values and vision
  - how the MAT operates as a single organisation
  - the benefits of being in the MAT
3. What is the rationale for future growth and development?
4. Are staff at all levels across the MAT engaged in a meaningful way – is this monitored?
5. Do our academy committees provide a local perspective and influence trust decisions?
6. Are there opportunities to collaborate, share expertise and resources with other MATs?
7. How do we assess the MAT's wider contribution? For example, do we champion environmental sustainability?

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### Future development and growth

1. What are the biggest risks to the MAT being successful?
2. Are opportunities for internal growth and collaboration being pursued?
3. What is our current appetite for growth?
4. Does the MAT have sufficient capacity to support its schools?
5. Does the MAT have sufficient capacity to add new schools?
6. Is there a clear view of what is the right geographical and cultural fit for the MAT?
7. Are the processes for carrying out due diligence sufficiently robust?
8. Should merging with another MAT be considered?
9. Are future development and growth plans informed by dialogue with the Regional Director?

# Identify success criteria

Success criteria are a fundamental part of any strategy because they clarify for all what the requirements are for successful outcomes. As a general rule, when determining what success looks like, it is important to consider 'SMART' outcomes that are:



**Specific Measurable Achievable Realistic Time-bound**

It is also important to consider each priority in its own context and whether success should be measured by quantitative or qualitative means. Most likely it will be a combination of the two.

The example below uses the template provided as an appendix to this guide (page 16) to demonstrate how priorities can be presented in a high-level strategy document.

Strategic objective:	To achieve improved environmental sustainability across the MAT
Linked to	Estate management/curriculum design/stakeholder engagement
Success criteria	<ul style="list-style-type: none"> <li>• Carbon net zero status</li> <li>• Reduced year on year energy consumption</li> <li>• Positive behavioural change: pupils and staff choose active travel options</li> </ul>
Who leads on implementation	The CEO has ultimate responsibility – refer to those who are responsible for implementation across the trust and at school level.
Who leads on monitoring progress	The trust board and CEO are ultimately responsible – refer to high level monitoring carried out by the CEO, trust board and academy committees. Includes strategy review meetings throughout the year.
Required resources	Based on estimate of staff time and external consultancy.

# Evaluate risks

**Risk management helps ensure strategic priorities are maintained and met. It is a requirement for academy trust boards, and good practice for all boards, to maintain a risk register and review it on a regular basis.**

The risk register should identify the risks associated with strategic objectives, including not pursuing or achieving them, and the potential impact on:

- daily operations
- financial sustainability
- safety
- wellbeing
- continuous improvement
- compliance
- reputation
- values and moral purpose

The framework referred to within [ESFA risk management guidance](#) is suitable for all types of school structure. NGA also provides [guidance](#) and training for governing boards to support their understanding of risk management.

## A checklist for evaluating risk

### Check assumptions

- ✓ all relevant information is available
- ✓ all relevant information is used in a rational way
- ✓ conflicting information is not subject to 'confirmation bias'

### Seek clarity

- ✓ all risks have been considered
- ✓ all risks are clearly defined – cause, uncertainty and consequence
- ✓ ownership has been assigned – usually to one person

### Ensure action

- ✓ risks are tolerated where the impact is acceptable
- ✓ risks are treated to modify their impact
- ✓ risks are reassigned where appropriate
- ✓ risks have been removed where all other options are exhausted

# Set out how each priority will be resourced

A robust strategy should contain clear estimates of the level of resource required to implement each priority and thereby ensure that all public funding including sponsorship:

- is directed to the areas of most need in the MAT
- provides equity of opportunity for all pupils and staff across the MAT
- improves the learning experience for all pupils and staff across the MAT

As the accounting officer responsible for ensuring financial compliance, efficiency and probity, the CEO provides the trust board confidence that decisions taken to invest resources are serving medium to long-term needs and securing value for money.

Financial reports, data and forecasts should also be used by trust boards to inform strategic resourcing decisions and identify opportunities for the MAT to generate income, optimise resources and make the most effective use of its reserves. Whilst boards meetings must take place at least three times per year, the level of financial monitoring required in a MAT warrants more frequent meetings and opportunities to scrutinise financial reports and ask questions. It is a requirement for MATs to prepare monthly management accounts and share them with the chair of trustees every month.

The [School resource management self-assessment checklist](#), which academy trusts are required to complete, and the [information, training and guidance](#) provided by the DfE serve as useful tools to help with financial oversight and decision making.

Many MATs use Integrated Curriculum and Financial Planning (ICFP) as a tool for achieving educational priorities across all its schools whilst remaining financially sustainable. The three basic planning principles of ICFP are the curriculum priorities, operating costs and income.

If the curriculum priorities and operating costs consistently exceed the income, then spending should be prioritised to ensure longer term sustainability. NGA, ASCL and NAHT offer a range of support and development opportunities for leaders and governors on adopting an ICFP model.

## Working with the chief financial officer

The chief financial officer (CFO) has an important role in coordinating the delivery of effective and responsive central services and high quality operational delivery across all schools in the MAT. They also provide valuable support towards financial and governance compliance, risk management and identifying the resources available to deliver the strategy.

Trust boards are encouraged to develop a good working relationship with their CFO and champion the work of business professionals working at all levels in the MAT.

# Monitoring the strategy

**Monitoring is the practice of gathering information through reports received, data provided, monitoring visits and conversations with staff and pupils. Evaluation is exploring what the information is saying.**

Monitoring and evaluation should provide a clear and accurate view throughout the year of:

- whether strategic priorities are being met or are on course to be met
- if not, the reasons why
- the actions, adjustments, support and challenge required to get progress back on track

The trust board and the CEO should agree the detailed arrangements for monitoring the strategy, along with the data and information required to evaluate progress and assess impact. This should be referred to in the strategy document.

Academy committees have an important role in monitoring improvement priorities and maintaining accountability across schools. The specific nature of this role should be made clear through the scheme of delegation and terms of reference for the academy committee.

## Measure what you value

Not all priorities lend themselves to simple quantitative measurement. Make the most of naturally occurring evidence, such as information obtained from a well planned visit.

The following table contains some of the most recognisable sources (both quantitative and qualitative) of evidence that trust boards apply to their context and use to monitor strategic priorities. Some of the sources, like those linked to leadership and management, apply to more than one area.

Priorities linked to:	Look for evidence of progress in:
<b>Use your scheme of delegation as a point of reference</b>	
MAT oversight	<ul style="list-style-type: none"> <li>• Executive reporting</li> <li>• Reports from academy committees</li> <li>• Admissions data               <ul style="list-style-type: none"> <li>– Trust wide</li> <li>– School level</li> </ul> </li> <li>• Complaints data               <ul style="list-style-type: none"> <li>– School level analysis</li> </ul> </li> <li>• Risk register</li> <li>• Stakeholder surveys</li> <li>• Trustee/governor visit reports</li> <li>• Trustee and local governor recruitment and retention data</li> <li>• External reviews of governance</li> <li>• Analysis of due diligence</li> <li>• CEO performance management outcomes</li> </ul>

Priorities linked to:	Look for evidence of progress in:
<b>Use your scheme of delegation as a point of reference</b>	
Staffing	<ul style="list-style-type: none"> <li>• Staffing (aggregated and school level data):               <ul style="list-style-type: none"> <li>– Recruitment</li> <li>– Retention</li> <li>– Diversity indicators</li> <li>– Absence</li> <li>– CPD</li> <li>– Career progression</li> </ul> </li> <li>• Talent management strategy</li> <li>• Flexible working requests</li> <li>• Secondments and deployments across the MAT</li> <li>• Wellbeing surveys and exit interviews</li> <li>• Feedback from staff</li> </ul>
Communication	<ul style="list-style-type: none"> <li>• Executive reporting</li> <li>• Reports from academy committees</li> <li>• Stakeholder surveys</li> <li>• Pupil and parent surveys</li> <li>• 360 feedback from individual school leaders</li> <li>• Trustee/governor visit reports</li> </ul>
Financial sustainability	<ul style="list-style-type: none"> <li>• Executive reporting</li> <li>• The process for setting executive pay</li> <li>• The trust's management accounts</li> <li>• Budget forecast returns</li> <li>• School level budget analysis</li> <li>• Risk register</li> <li>• School resource management self-assessment</li> <li>• Financial benchmarking tools</li> <li>• Schools resource management self-assessment</li> <li>• External feedback</li> <li>• Audit reports</li> <li>• COO/CFO performance management outcomes</li> </ul>
School improvement	<ul style="list-style-type: none"> <li>• Executive reporting</li> <li>• Reports from academy committees</li> <li>• Aggregated data               <ul style="list-style-type: none"> <li>– Progress and attainment of different groups</li> <li>– Attendance</li> <li>– Behaviour and exclusions</li> <li>– Access to learning support</li> <li>– Safeguarding incidents</li> </ul> </li> <li>• Trustee/governor visit reports</li> <li>• Pupil/student/parent surveys</li> <li>• Feedback from trust wide curriculum and school improvement leads</li> <li>• Ofsted reports</li> <li>• Ofsted MAT summary evaluations</li> <li>• CEO performance management outcomes</li> </ul>

## CEO reporting

The CEO's termly report is fundamental to the trust board's monitoring of the strategy.

Trustees should expect the information included in the CEO's report to be largely aligned with the strategy and be detailed enough to allow a thorough and accurate assessment of progress. However, producing reports should not create an excessive workload for the CEO/executive team.

Most CEO reports cover the following to varying extents throughout the year:

- significant management issues
- progress made against strategic priorities
- risk analysis
- medium to long-term issues
- feedback from stakeholder groups
- reports from academy committees
- finance/resources/accounting officer responsibilities

## Data

The trust board should expect to receive data in a timely and manageable fashion as tangible evidence of progress.

It is also important that trustees understand the data they receive and this should be taken into account when deciding how data is presented and the development priorities for the trust board.

As a general rule, the data should be:

- up to date
- relevant to the strategy and success criteria
- aligned with other reporting
- in some cases verified by at least one other source
- conducive to decision making

DfE [guidance](#), [Understanding your data: a guide for school governors and trustees](#), refers to seven data 'themes' to use as an evidence base when discussing performance. [Guidance](#) and information is also available to help boards analyse the DfE school and college performance tables and [analyse school performance](#) (ASP) data.

## Asking questions

Trustees are expected to ask questions about the information they are provided with, and they should expect to receive clear answers.

The way in which questions are asked is likely to impact on the way the question is perceived and answered. When asking a question, keep in mind that accountability is about analysing how things are working and what should be done collaboratively, rather than apportioning blame.

## Monitoring visits

Monitoring visits provide the trust board with essential information about how its strategy is being implemented and how issues discussed at board level translate into everyday life across the MAT. Some MATs appoint trustees to each school who are responsible for visiting and often have a specific strategic area assigned to them.

The size of the MAT will likely influence how trustee visits complement the visits carried out by those serving on academy committees. Trustees in a larger, dispersed MAT are more likely to rely on academy committee members to be their eyes and ears on the ground, although it is important that trustees do visit and get to know their schools. Regular communication between the trust board and academy committees will ensure both that the trust board benefits from local feedback, and the academy committee has a sense of purpose and connection to the MAT.

## Annual review of progress

Even though the strategy is for a three (or five) year period and is therefore effectively a rolling document, a formal annual review of progress should still take place and feed into the annual strategy day and or more frequent strategy meetings.

If monitoring throughout the year is effective, then the annual review is simply an opportunity for those leading and governing to reaffirm what is going well and what needs to improve, as well as highlighting where the strategy is in its lifespan and any significant changes that are required. The review should also consider:

- whether a major review and or change of direction is required
- any significant changes to circumstances
- any significant changes to the landscape in which the MAT operates
- issues relating to communication, working relationships and culture
- how stakeholders are engaged



# Communicating the strategy

**Communication is the key to gaining 'buy in' to the strategy.**

The trust board and CEO should discuss their approach for communicating the strategy to stakeholders and building a narrative around it. This is important and contributes towards a shared sense of ownership and understanding of direction.

The aim should be to:

- explain the difference that achieving the vision and priorities will make to pupils and communities
- explain the role of stakeholders in supporting the school to achieve the vision
- reach different audiences: parents, pupils, staff, community leaders etc
- utilise different platforms, for example:
  - internal communication
  - website
  - briefings
  - conferences
  - networking
  - external meetings
  - social media

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## The role of academy committees

While the delegated responsibilities of academy committees vary, they are a powerful and sometimes undervalued force for championing the vision, values and strategic priorities of the MAT as a single organisation.

Ensuring that academy committees are a fundamental part of the plan for communicating the strategy brings increased opportunities to engage pupils, parents, staff and communities across the MAT.

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# Creating the right culture

**The right culture should be in place for the strategy to succeed.**

**“The board and executive leadership team anchor the trust’s strategy in the needs of its schools, the communities they serve and the wider educational system in line with its charitable objects. The Accounting Officer, board and leadership team create a culture of ethical leadership, including the Seven Principles of Public Life.”**

Source – Trust quality descriptions, April 2023

Culture – the way things are done – is what makes a MAT and the schools in it unique. It is influenced by values and influences behaviours and practices. It should be perceived in the same way by everyone and is a crucial to the strategy succeeding.

Through its culture, an organisation can convey such things as:

- humanity and compassion – an overriding concern for the wellbeing of everyone
- openness and transparency
- high expectations of performance and accountability
- balancing challenge with support and appreciation
- commitment to professional growth
- sensitivity to diverse views and other narratives

Those leading and governing across the MAT should work together to foster a culture that reflects their values and is reflected in policy and practice.

To truly understand the culture that exists in the MAT, trustees need to carry out regular visits and speak to pupils, parents, staff and those governing at local level. Where this presents challenges because of the size of the MAT, then it becomes even more important that the trust board has strong links and good lines of communication with academy committees.

## Where to find evidence of a positive culture in your MAT

- working relationships and sharing of practice
- safeguarding and compliance
- fair access to pupils
- promotion of inclusivity
- elimination of discriminatory practice
- MAT leadership and governance is increasingly reflective of the community
- local contribution (such as collaborating with other MATs and the LA over admissions)
- wider contribution eg developing future leaders in the sector
- the way success is celebrated across the MAT
- how underperformance is treated
- manageable workloads
- family friendly policies
- handling of complaints
- investment in CPD and talent management

# Appendix

## Strategy document template

The following template can be adapted to align with other plans and documents. Add as many strategic priorities as you need. You can download an editable, printer friendly version [here](#).

Our vision:	
Our values:	

To achieve our vision, we have the following strategic priorities:

Strategic objective	
Linked to	
Success criteria	
Who leads on implementation	
Who leads on monitoring progress	
Timescale	
Required resources	

# Useful resources

- [Welcome to a Multi Academy Trust induction guide](#)
- [What governing boards and school leaders should expect from each other](#)
- [Governor and trustee role descriptions](#)
- [Chief executive officer \(CEO\) job description](#)
- [Stakeholder engagement resources](#)
- [Governing board self-evaluation questions](#)
- [Schemes of delegation guidance](#)
- [Risk management guidance](#)
- [Integrated curriculum and financial planning guidance](#)
- [School visits guidance, policy and planning tools](#)

## **Schools and trusts with a religious character**

- [Publications from The Catholic Education Service](#)
- [Education publications from The Church of England](#)

**NGA is the national membership association for governors, trustees and governance professionals in England's state schools and trusts.**

We empower those in school and trust governance with valuable resources, expert support and e-learning. Together, we're raising standards and shaping stronger governance to ensure every pupil can thrive today – and tomorrow.



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