

# L.E.A.D (LEAD EMPOWER ACHIEVE DRIVE) ACADEMY TRUST

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(Interview: 5/11/2014)

*Practical example of a **restructure** from **umbrella trust** to **multi-academy trust** and the **considerations** to take into account during the process.*

## Background

Diana Owen, head teacher of Huntingdon Primary and Nursery School, was motivated to convert to academy status to increase her school's autonomy, including giving her school freedom over their finances. They were already supporting other schools who wished to convert in Nottingham and the surrounding area and wanted to keep the established aspects of the partnership and collaborative working.

In September 2011, the lead school, Huntingdon Primary and Nursery School, along with a local school they were already collaborating with, converted to academy status. They set up LEAD Academy Trust, an umbrella trust (UT) which brought schools together whilst allowing them to retain their own identity and community links.

The decision was taken in September 2013 to change their structure and bring all the schools into a MAT rather than a UT. The new structure enabled the raising of academic standards through collaboration whilst overcoming their governance problems by maintaining effective leadership of their schools.

LEAD MAT now comprises 12 primary schools with a mix of converter and sponsored academies, and two further projects in the pipeline.

## Motivation for structural change from UT to MAT

LEAD's main motivation to change their structure was so that they could guarantee a consistent and thorough system through which both academic and teaching standards could be raised across the whole group.

By 2013, LEAD UT had grown to seven schools. Each of the schools that had joined had done so with their existing governing bodies retaining their power and personnel. Diana Owen stated that "the MAT structure would allow the board to coordinate trust-wide policy and intervene in cases of underperformance."

Restructuring from an UT to a MAT enabled LEAD to:

- Establish clearer lines of accountability
- Ensure consistency across systems, data, and finances, governance
- Secure economies of scale in procuring services and goods
- Simplify the process for the MAT to support academies in categories

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- Eliminate differences in academies' policies
- Address the specialist skills sets required for central and local board members which were spread thinly across a number of academies
- Give greater authority to the senior management team to oversee academies senior leadership teams

## Important Considerations

The Trust board's initial desire to ensure that all academies felt of equal stature, irrespective of Ofsted rating, was becoming increasingly difficult within an UT, as it was not possible to delegate differing levels of autonomy. Furthermore, the MAT structure would ensure that an appropriate scheme of delegation could be implemented that would provide more authority to the MAT through local governing bodies (LGBs), whilst maintaining levels of autonomy for each school. This would help the Trust become more effective, avoid excess bureaucracy and help ensure the organisation did not become impersonal; it was important for key leaders and staff to be familiar with each other.

## **Current Structure**

LEAD MAT was established. As all the schools had an aligned vision and wanted one another to succeed, they were each able to see this as a stepping stone towards a position where the Trust could implement real change and raise standards.

In addition to their vision, the benefits of restructuring were clearly communicated to the schools in the Trust. The MAT structure brings financial benefits, achieve the desired consistencies stated previously, and, given the difficulty of recruiting high-quality staff in deprived areas, provide opportunities for staff career progression.

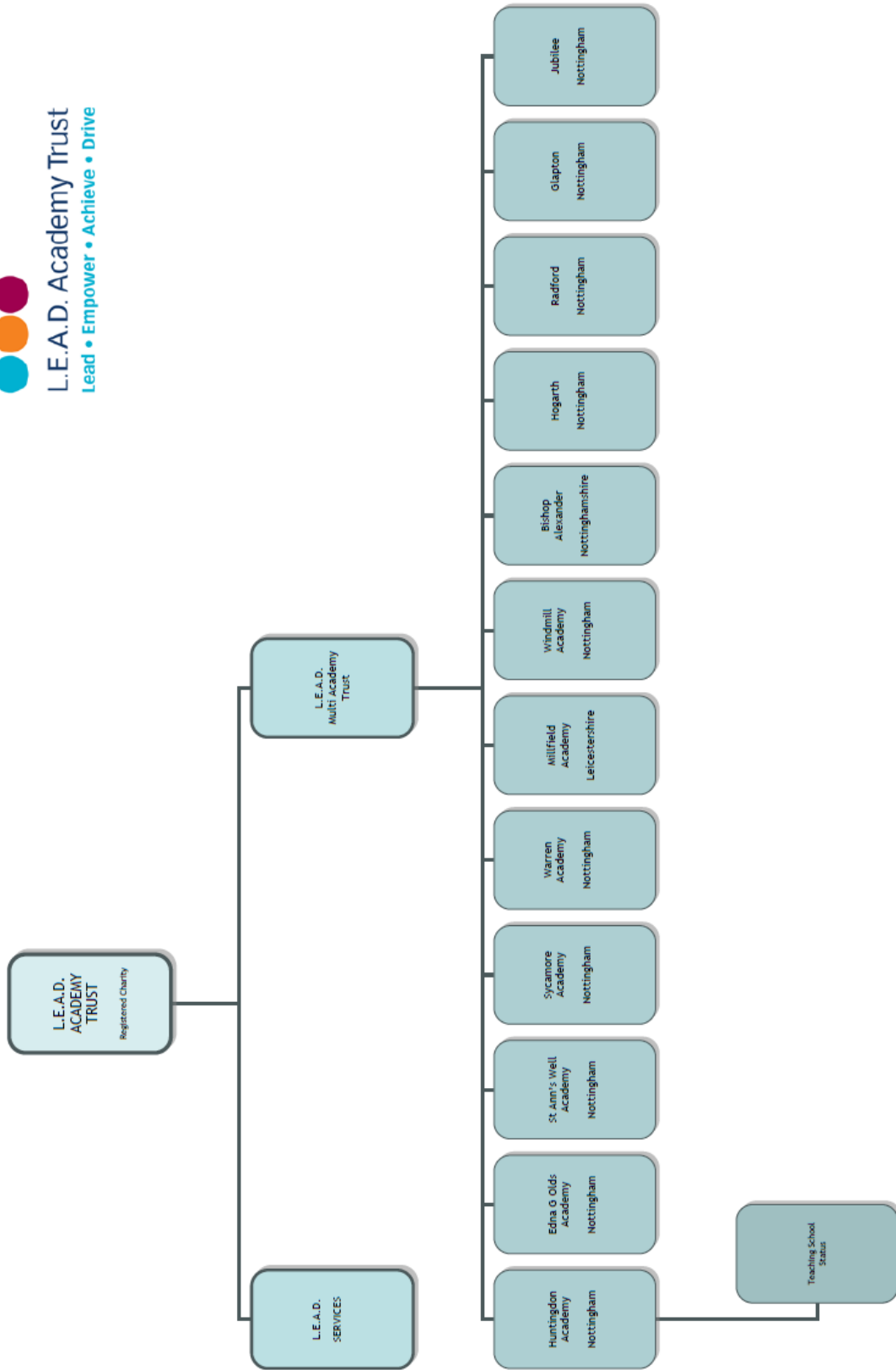
LEAD Academy Trust is a registered charity and acts as the parent company for the MAT and LEAD Services, the trading arm of the Trust. LEAD MAT's model is for their 'good' or 'outstanding' academies to support each sponsored academy and share best practice to raise standards. They now have a small MAT board (with six individuals) with LGBs reporting on behalf of their individual schools.

LEAD Services acts as the trading arm of the Trust providing professional services to schools outside the Trust in areas such as financial management, IT, leadership qualifications and a range of educational programmes.

# L.E.A.D (LEAD EMPOWER ACHIEVE DRIVE) ACADEMY TRUST



L.E.A.D Structure Chart



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## **Board Members**

LEAD Academy Trust's board has six members who oversee both the MAT and LEAD Services. They are not directly responsible for the schools under the MAT but hold the directors of both branches of the Academy Trust to account.

LEAD also sought individuals with experience of operating at a strategic level, in particular those that have served on governing boards in a business environment. In addition to their three members, they have recruited five effective and experienced trustees with legal and financial expertise to serve on the MAT board and hold LGBs to account.

At LGB level, LEAD look for individuals with the same expertise if possible, yet place a higher emphasis on community representation. Given the difficulties LEAD UT had in coordinating schools' governing bodies, under the MAT they now have smaller LGB's.

As the organisation has grown, volunteers have approached the Trust directly to become a part of it. These individuals have been interviewed and added to a bank of potential future governors that can be drawn on when required.

When a 'good' or 'outstanding' converter academy joins the Trust, the LGB will retain many of the schools' original governors. However, in cases of sponsored academies, LEAD will review the effectiveness of the schools' governors and if necessary will supplement the LGB with people chosen by them, in many cases from the bank of potential governors.

## **Schemes of Delegation and Reporting**

### Trust Board

As stated previously, the role of the Trust board is to hold to account the directors of both LEAD Services and LEAD MAT. The Trust board meets once a term and examines high-level information including financial benchmarking and performance reports. The role of this board is advisory and strategic.

### MAT Board

The role of this board involves strategic and academic oversight of the MAT as well as outlining the Trust's vision and policies. They meet half termly to discuss all areas for which they have delegated ownership and are provided with standardised data from the LGBs on school performance and finances. They have a number of standing agenda items which are discussed cyclically throughout the year such as financial returns and academic performance reviews.

The MAT board are responsible for setting academic and financial targets for each of the LGBs, agreeing academies' annual budgets (in consultation with the LGBs), ensuring compliance with regulation and providing training for all governors. This

## L.E.A.D (LEAD EMPOWER ACHIEVE DRIVE) ACADEMY TRUST

ensures that LEAD can maximise standards in each of their academies and achieve the best possible outcomes for pupils.

The MAT board are far more involved in the Trust schools' governance than the Trust board; the latter maintain an overview of LEAD Academy Trust as a whole rather than examining each school within the MAT.

### LGBs

The LGBs meet half termly and their role is to question and challenge academy leadership and to hold them to account. Whilst the academies' overall budgets are approved centrally, the LGBs make recommendations to the MAT board and are responsible for deciding how best to spend this money. In cases where a LGB is particularly strong and overseeing an academy performing well both financially and academically, increased responsibility may be delegated to them from the central board.

#### **Key learning points:**

- Proactively recruit individuals with the correct skills and experience to boards
- Structures and schemes of delegation need to be clear
- Ensure you seek legal advice at each stage of the process