What trust boards, CEOs and executive leaders should expect from each other

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ASCL Association of School and College Leaders

ISBL Institute of School Business Leadership

Local Government Association

NAHT FOR LEADERS, FOR LEARNERS

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This joint guidance sets out how the three strands of leadership work together to ensure organisational success in multi academy trusts (MATs):

- **Governance leadership** – strategic vision, oversight and accountability.
- **Education leadership** – organisational management, pedagogy and school improvement.
- **Business leadership** – operations, human resources, estates management, procurement, technology and finance.

The trust board delivers its strategic functions while the executive leadership team (including the CEO, education and business leaders) provides operational leadership, implementing the strategic priorities of the board through their day-to-day management of the schools in the trust.

Terminology

We use '**trust board**' in this guidance to mean the accountable body responsible for all the schools in a MAT. The trust board can delegate functions to academy committees, also known as local governing bodies.

We use '**CEO**' to mean the senior executive leader who is responsible for the overall management of the MAT and leads the executive team. They are held to account by the trust board.

1 Promoting effectiveness

Professional development is essential to ensure the effectiveness of leaders, helping to build expertise and capacity. All leaders are responsible for establishing a culture that promotes continuous quality improvement and for enabling and investing in it.

The needs of all employees should be considered in CPD programmes, including both those with educational and business functions.

Attention should also be given to governance capability – NGA believes that there are eight key elements that form the foundations to governing effectively in a trust.



1. **The right people around the table** – having a diverse blend of knowledge, skills, perspectives and backgrounds to govern effectively.
2. **Understanding the role and responsibilities** – the overarching aim of governance is to ensure the wellbeing of children and young people, enabling them to achieve to the best of their ability.
3. **Good chairing** – the chair leads the board and influences culture and conduct.
4. **Professional governance support** – coordinates board business, providing advice and overseeing compliance.
5. **Good working relationships** – between board members as well as with the CEO and other executive leaders.
6. **Knowing the school/trust** – understanding the trust's strengths and weaknesses.
7. **Committed to providing scrutiny and challenge** – discussing the information provided, with confidence to have courageous conversations where needed.
8. **Continuous evaluation and improvement** – boards should regularly review impact and seek to improve.

Trust boards adopt a code of conduct that details the behaviour and professional standards expected of trustees.

2 Working together

Delegation

Trust boards can delegate their strategic functions to committees, where sub-sets of trustees (or local governors in academy committees) oversee specific areas in more detail, and will also delegate operational functions to the CEO and wider executive team. Arrangements should be set out in a scheme of delegation that is approved by the trust board.

The chair and CEO relationship

Trust boards appoint a chair (or co-chairs) to lead the board. Supported by the vice chair, the chair ensures that the board fulfils its functions well by facilitating teamwork and supporting all trustees to participate actively and equally.

The chair and CEO have equal responsibility for developing a professional relationship based on trust, mutual respect and appreciation of their respective roles. They will have routine one-to-one meetings which can be used to:

- discuss the CEO's development needs and wellbeing
- keep each other informed to ensure there are no surprises at meetings
- have honest conversations where the chair acts as a confidential sounding board

Governance professionals

The lead governance professional works with the trust board, CEO and other executive leaders to ensure that meetings are well planned, take place at appropriate intervals and have manageable agendas. They provide advice and will communicate with the chair and CEO to confirm the custom and practice of the trust board. The governance professional will also have a range of compliance responsibilities.

Integrated decision-making

Integrated ways of working between the governance, business and educational functions include:

- operational leaders attending relevant board and committee meetings – for example, the CFO can attend finance, audit and risk committee meetings and answer questions on strategic resource planning
- link trustees assigned to lead in a particular area regularly meeting with the relevant members of staff – all boards must have a SEND trustee and a safeguarding trustee and may also decide to have link roles for other areas
- shared reporting and monitoring on different outcomes and performance areas, such as integrated curriculum and financial planning (ICFP)

Board monitoring practices

To hold the executive leadership to account, trust boards monitor and triangulate different sources of information, using that to provide support and challenge.

Reporting and data

The CEO's termly report is fundamental to the trust board's ability to provide effective oversight. The trust board determines the content of the reports and the data it needs to evaluate progress made towards strategic priorities, identify risk and inform support and challenge. This should be discussed with executive leaders to ensure that the resulting workload is both reasonable and proportionate.

School monitoring visits

Trustees visit their schools to gain an understanding of how the vision and strategy are being implemented in practice and the culture reflected in daily life. Visits are usually focused on a specific area or priority and carried out by link trustees who will meet with the member of staff with relevant leadership responsibility. Executive leaders are expected to encourage such visits and support with the arrangements.

Asking questions

Trustees are expected to ask questions about the information they are provided with, and they should receive clear answers from executive leaders. Boards should ask challenging questions to gain clarity and test assumptions, having courageous conversations where needed in the interests of pupils. This should be done in a collaborative and constructive manner.

The following sections provide a non-exhaustive overview of functions carried out by the governance, education and business strands of leadership.

4 Vision and strategy

The trust board and executive leadership have a shared responsibility for setting the vision of where they want their trust to be in three to five years' time and a strategy with agreed priorities for achieving that vision.

This is then used to inform operational planning, which the CEO, education and business leaders implement through day-to-day management.

Governance	Education	Business
• Lead on and approve the values, vision and strategy. • Set risk appetite. • Ensure stakeholder voice is considered. • Promote whole-school equity, equality, diversity and inclusion. • Monitor and evaluate progress made on strategic objectives.	• Propose evidence-based school improvement options and develop operational plans. • Consider resourcing and staff development needed to meet strategic aims. • Monitor and evaluate impact on pupils.	• Advise on capacity and affordability. • Ensure sustainability. • Consider resourcing implications regarding finance, people and infrastructure. • Maintain the risk register on risks associated with strategic objectives.

All have shared responsibility	• Self-evaluate to establish where priorities lie. • Champion shared strategic priorities and measures. • Foster an ethos and culture that reflects the trust's values.

5 Operational accountability

The board provides accountability and assurance over the effective operation and performance of the trust in the following four key areas:

Financial performance	
Governance	• Approve and monitor the budget. • Ensure value for money in purchases. • Monitor resource management eg benchmarking. • Decide how funds are distributed across schools eg general annual grant (GAG) pooling. • Review and approve annual audit and accounts.
Education	• Ensure resources are aligned to educational needs and priorities. • Manage resources within agreed budgets. • Evaluate impact of spending on pupils.
Business	• Draft the budget. • Provide timely management accounts. • Maximise value for money in spending decisions. • Manage resources efficiently, including the estate (buildings, grounds and digital infrastructure), investments, savings and income generation.

Pupil outcomes	
Governance	• Monitor pupil performance data including for specific pupil groups such as those with SEND. • Monitor quality of teaching and learning and its impact on pupils. • Ensure a culture of inclusion. • Monitor pupil mental health and wellbeing. • Monitor attendance and behaviour to support both effective learning and wellbeing.
Education	• Implement trust improvement plans. • Promote a working culture of quality improvement and professional development for staff. • Embed latest pedagogical knowledge and practice. • Use ICFP to design curriculums that achieve educational priorities. • Identify barriers to pupil learning and wellbeing and establish systems and practices that respond to needs.
Business	• Secure resourcing needed for educational priorities, including workforce deployment, learning environment and technology and systems used. • Use ICFP to design affordable and sustainable curriculums.

Employer responsibility	
Governance	• Appoint the CEO and manage their performance, development and wellbeing. • Appoint the CFO. • Oversee a people strategy that creates the conditions to recruit, develop, reward and retain the best staff. • Approve staffing structure that will enable strategic priorities. • Monitor impact of strategies and initiatives that promote a positive and sustainable workplace. • Ensure access to professional development for all staff.
Education	• Model a positive and sustainable workplace culture. • Seek to reduce unnecessary workload. • Identify staff support and CPD needs. • Consider staff structure and roles needed to meet operational and pupil needs.
Business	• Advise on staffing costs and sustainability. • Consider staff wellbeing and development costs in budget. • Provide HR and employment advice.

Compliance	
Governance	• Ensure legal and regulatory compliance eg health and safety, data protection. • Monitor pupil safeguarding. • Approve certain policies and ensure all policies are applied consistently. • Monitor risk, maintaining oversight of the risk register. • Oversee a programme of internal scrutiny. • Seek independent assurance.
Education	• Formulate and implement policies. • Undertake training as needed. • Monitor practice, carrying out checks and reviews as appropriate. • Safeguard pupils.
Business	• Manage risk register. • Ensure statutory compliance. • Arrange and conduct necessary audits and checks. • Seek expert advice when needed. • Formulate and implement policies. • Undertake training as needed. • Work on meeting digital standards. • Manage the trust's internal control framework.

6 Stakeholder engagement

The trust board and executive leaders have a shared commitment to building and maintaining key stakeholder relationships with pupils, parents, staff and the wider community. This creates the conditions for more informed and effective decision-making as well as shared ownership in them.

Governance	Education	Business
• Ensure stakeholder views inform board decision-making. • Oversee engagement strategies. • Promote transparency and accountability, communicating decisions clearly to stakeholders. • Establish engagement methods with the local tier (academy committees).	• Develop and implement communication and engagement mechanisms eg surveys. • Collate results and feed back to the board. • Identify and seek to remove barriers to engagement with the trust community.	• Support implementation via trust operations. • Make sure the systems and technology used work well and provide value for money. • Ensure engagement is effective and accessible.

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