



ANNUAL REPORT

2019 – 2020



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The Queen Street Group is grateful for the continued support of Bates Wells, a values-based law firm, ranked in the top tier of Legal 500 for its expertise in Schools and Charities.

FOREWORD

This second Annual Report of The Queen Street Group of multi-academy Trusts (MATs) sets out its work during 2019–20 – a year of dramatic contrasts. Between September and February schools followed their normal routines and activities, only for these to be completely disrupted from March through to August by the COVID–19 global pandemic.

This sudden gear-change, experienced by countries around the world, affected the governance and management of all kinds of institution across civil society. Schools were no exception as governors and leaders moved from accustomed rhythms of work to a state of continuous improvisation.

Compared to many workplaces the activities of schools are strongly cyclical and heavily regulated. For the first part of 2019–20 these structures remained firmly in place before falling away almost completely as adults and children were “locked down” at home. So began the first national interruption to the legal requirement, effective since 1 January 1881, that children attend school.¹

Nevertheless, this report of Queen Street Group activity during 2019–20 is as much an account of continuity as of dislocation. For while one effect of the unprecedented circumstances brought about by COVID–19 was to suspend most of government activity aimed at strengthening and enlarging its academies programme in England, The Queen Street Group continued its efforts to balance operational demands with deeper thinking about how those who govern and manage MATs can realise their first and most important priority: ensuring high-quality learning among pupils by enabling staff in schools – not just teachers but all those who contribute in various roles – to work as effective and fulfilled professionals.

¹ Provisions of the Education Act 1880, §2. For a description of the patchy disruption to schools caused by the 1919 flu pandemic, see: “Far too little, too late”: what happened when Spanish Flu hit Britain a century ago?, BBC HistoryExtra (March 2020) at: <https://www.historyextra.com/period/first-world-war/spanish-flu-britain-how-many-died-quarantine-corona-virus-deaths-pandemic/>.

EXECUTIVE SUMMARY

The Queen Street Group: origins, aims and values

Following discussions begun in June 2015, a group of MAT CEOs decided to create a formal legal entity to facilitate the exchange of operational insights across their organisations, peer-to-peer. The Queen Street Group (QSG) was incorporated in November 2018 with 17 Trusts in membership and as a practical body designed to encourage organisational development, both collectively and within each Trust. [Section 1.1]

This activity matured during 2019–20 as the insights derived from mutual exchange became increasingly important to member Trusts. These benefits were experienced at three levels:

- ~ within each Trust – as CEOs and senior staff increased their involvement in QSG work;
- ~ across the 17 Trusts – as mutual priorities became major topics for discussion and communication with outside organisations; and
- ~ for QSG as an organisation – especially through continued development of its infrastructure.

QSG's formal object is “to advance education for the public benefit”. As part of this, its constitution articulates particular collective values, based on common ethical standards in the provision of high-quality pupil education. [Section 1.2]

The Queen Street Group: facts and figures

- ~ The 17 QSG member Trusts between them educate 220,000 pupils enrolled across 399 schools (an increase over the previous year of 19,000 pupils and 25 schools). The schools are located in all of the eight regions of England overseen by Regional Schools Commissioners and two thirds of the pupils are educated in secondary schools. The Trusts are highly varied in origin, size and geography but share a commitment to improving the education of children living in disadvantaged circumstances whose schools have lost their way and require a fresh start. [Sections 2.1-2.2]

~ Compared to the national average, pupils in schools managed by QSG member Trusts are considerably more likely to qualify as Pupil Premium students. The member Trusts' common commitment to pupils in disadvantaged circumstances means that there is a much higher proportion of sponsored academies across these schools than is found across categories of academy nationally. As such, inspection results across the schools in QSG Trusts are much stronger than the overall national picture for schools with troubled histories. [Section 2.3]

Activity in 2019–20

The second half of the school year brought unprecedented challenges in securing continuity of education for school pupils across England. The effect of this on the work of QSG was dramatically to increase the pace of its activity, the content of its work streams and the frequency of meetings.

The main result within QSG of working under crisis conditions was to confirm the importance of the overarching themes developed by the Group over the 18 months to February 2020, while reordering and refining more detailed operational priorities so as to cope with crisis conditions. [Section 3.1]

Quality of Education in 2019–20

As the year unfolded, the collective work of the QSG Directors of Education changed emphasis. At the outset themes carried forward from the previous year included financial pressures in the face of all that might be done to secure quality of education, the well-being of staff and a fresh focus on the intrinsic curriculum ethos of Trust schools.

These themes remained important but were reshaped during the year by the global pandemic. The underlying financing of schools remained stable (compared to other aspects of society) but specific resourcing challenges emerged as schools closed and children were sent home. Staff well-being also came to the fore in a completely unexpected way as fears for personal safety and widespread professional improvisation became the norm. Revisions to the curriculum over the medium term gave way to more immediate concerns about the essential continuity of educational provision and the reliability of pupil assessment in the absence of public examinations. [Section 3.2]

Financial planning in 2019–20

QSG Trusts are predominantly responsible for sponsored academies and this brings added complexity to the discipline of school-based financial planning. Prior to the onset of COVID-19, the QSG Directors of Finance focused much of their collective effort on the financial disincentives to take on schools in challenging circumstances, a growing gap in the funding required for capital projects (based on condition survey requirements and available finance) and continued difficulty in accurate financial forecasting due to frequent revisions of government spending announcements.

These priorities remained salient in the second half of the year, but the pandemic saw a volatile funding environment made more uncertain by the financial improvisations which rapidly accompanied the decision to close the nation's schools. As a result, accurate financial forecasting remained a dominant concern but also focused the attention of larger Trusts on the potential to secure greater financial autonomy for their schools (in the form of investment in discretionary priorities, both in response to the impact of the pandemic and for longer term strategic purposes). [Section 3.2]

HR considerations in 2019–20

As in previous years, the QSG Directors of HR faced the continuing challenge of recruiting high-quality prospective teachers (including those from black, Asian and minority ethnic backgrounds), while striving to streamline the workload of existing staff. Also significant for member Trusts is continuing work to explore more systematically the role of all categories of school staff (teaching and non-teaching) in institutional performance and development.

Following the national lockdown in March 2020, this focus on enhanced school performance necessarily shifted from capacity to bring about improvement over, say, a three-year period to that of securing operational effectiveness on a week-to-week basis with all of the complexities involved in employee consultation, communication, health and safety. Meanwhile, the likely impact of the pandemic on the labour market had the potential to ease the challenge of recruiting high-quality teachers, but there was an immediate need to recognise shortfalls in the practical experience of those completing disrupted teacher training courses while stimulating discussion about the medium-term attractiveness of teaching as a career to younger generations of graduates. [Section 3.2]

The CEO perspective: effective governance and management of Trusts

Along with their responsibility for effective oversight of the various operational challenges confronting Education, Finance and HR in their Trusts, the QSG CEOs maintained their focus during 2019–20 on three areas of priority work identified during the previous year. These were: finding new ways of explaining what multi-academy Trusts with proven track records and clear ethical commitments are seeking to achieve; contributing to coherence in the structure and operation of the government's academies programme, especially in relation to the work of Regional Schools Commissioners; and reviewing and commissioning examples of innovation in the ways in which schools can best meet the needs of a fast-changing society. [Section 3.3]

Given their strategic importance, these areas of priority work for the CEOs remained broadly unchanged during the year even as, from March 2020 onwards, the pressing challenge of maintaining continuity of education for pupils under COVID-19 conditions became their greatest short-term preoccupation. [Section 3.3]

Reflections on an extraordinary year

A principal purpose of The Queen Street Group is to increase the sophistication and effectiveness of its member Trusts through peer-to-peer encouragement, learning and support. Thus, it is no surprise that a year of unparalleled difficulties for schools underscored the importance of collegiality and shared expertise amongst those responsible for leading and managing Trusts.

In the event, the working methods of the Group remained constant and proved supple in use. The QSG emphasis on collective values and professional support stood up well to the overall emergency and it was striking how the medium-term priorities developed within the Group during 2018–19 remained relevant, even as they were revised and reshaped by the pressing priorities of COVID-19. [Section 3.4]

Developing the infrastructure of The Queen Street Group

During the year there were four ways in which The Queen Street Group developed its infrastructure as a public benefit organisation.

WEBSITE

May 2020 saw the launch of a QSG website, designed to present factual information about the organisation and host its reports and other publications. During 2019–20 these included the first three in a series of Think Pieces outlining some of the directions in which school education might develop over the next three or four years. [Section 4.1]

MEMBERSHIP REQUIREMENTS

During the winter of 2019–20 the QSG Membership Committee developed a formal code for the admission of new members, along with a set of Membership Requirements binding on each member Trust. Among other provisions, this code requires all member Trusts to adhere to a QSG Statement of Ethical Commitment (included as an appendix on p. 33 of this Annual Report). [Section 4.2]

MODEST EXPANSION IN THE SIZE OF QSG

During the year preparations were laid for six further Trusts to join the QSG membership from 1 September 2020, bringing the total number of member Trusts to 23. [Section 4.3]

STRENGTHENING THE ROLE OF THE TRUST HEAD OFFICE FUNCTION

The year also saw steps taken to strengthen the head office function of Trusts in membership of QSG. This work focused in particular on establishing the principal contribution of Executive Assistants in member Trusts, identifying the challenges such staff face and outlining the contribution they make to school improvement within their respective organisations. [Section 4.4]

The Queen Street Group: Priorities for 2020–21

The work of QSG will continue to focus on strategic discussion among the CEOs and invited guests, complemented by the more detailed operational considerations of specialist teams of directors.

CEOS' STRATEGIC OVERVIEW

This will focus on: the continued generation of pandemic-related and general intelligence for ministers, their advisers and others; the provision of thought leadership for a wider audience on the evolving role of schools in a fast changing society infused with digital technologies; and continued focus on policy and ethical practice within multi-academy Trusts undertaking the task of improving education in schools in challenging circumstances. [Section 5.1]

EDUCATION

Priorities for the coming year include, above all, maintaining curriculum continuity for pupils in each year group. In addition, work will be required to determine the extent to which “blended learning” (face-to-face vs. on-line, in school and at home) is an operational expedient during a pandemic or represents the beginnings of an important pedagogic shift. With the reliability of public examinations remaining under question, there is also likely to be increased focus on the reliability and timeliness of formative assessment in schools. [Section 5.2]

FINANCE

The year ahead will bring a continuing need to undertake accurate financial forecasting in an unstable funding environment as well as refinement of methods for assessing the viability of taking on new schools in challenging circumstances and authorising essential capital projects. These tasks should encourage QSG Directors of Finance to pursue a selection of strategic themes, such as: the most sophisticated ways of managing financial reserves; assessing the varied performance of individual schools in relation to their funding; and determining the additional costs borne by those Trusts which specialise in reviving the fortunes of ailing schools. [Section 5.3]

HR

Employee consultation and communications will continue to play a central role in QSG Trusts as operating conditions remain uncertain. Work roles will continue to need reconfiguration, both to include the flexibility to teach pupils online and, when necessary, from home, but also to accommodate the increased use of blended learning. The QSG Directors of HR will also be looking ahead beyond the pandemic at future career patterns for teachers in a society where the expectation of work and workplaces among employees appears to be shifting rapidly. [Section 5.4]

TRUST HEAD OFFICE CAPACITY

The QSG network of Executive Assistants plans to spend time during 2020–21 refining insight into: the principal contribution of the Executive Assistant / Head Office manager role within maturing multi-academy Trusts; the challenges confronting Trusts of carrying out these roles; and the contribution of these post-holders to the task of school improvement. [Section 5.5]

Conclusions

The second year of QSG activity has seen its workstreams established in 2018–19 starting to mature. Meanwhile, the underlying collective goals of QSG Trusts remained constant even though short-term priorities were transformed by crisis management under COVID–19.

During 2019–20 the task of balancing immediate pressures and underlying core purposes was made much more effective and collegial for QSG member Trusts by regular meetings across the Group in which shared values were constantly to the fore. Moreover, the work of QSG during the year benefited others, including those in government in receipt of QSG briefings and those who interacted, through the website and on social media, with the Group's published Think Pieces.

All of these activities are means to a single end and it is the quality of education experienced by all pupils that matters most. All schools, including those managed by QSG member Trusts, will be working hard in the year ahead to mitigate the worst effects of COVID–19 dislocation, especially for pupils living in disadvantaged circumstances who stand to be among those most affected. As part of this, QSG's member Trusts will continue their distinctive work of providing a fresh start to sponsored academies beginning the road to recovery from recent troubled histories. [Section 6]

1 THE QUEEN STREET GROUP: ORIGINS, AIMS AND VALUES

This opening section explains the rationale of The Queen Street Group (QSG), describes its aims and values, and provides information about the member Trusts and the QSG board.

1.1 Origins

A group of multi-academy Trust (MAT) chief executive officers (CEOs) began meeting informally in June 2015. This group became a voluntary alliance that met regularly during 2016–18 to exchange operational insights, peer-to-peer. During 2017–18, the CEOs decided to create a formal legal entity to encourage and extend these discussions, leading to The Queen Street Group being incorporated in November 2018 with 17 Trusts in membership.²

1.2 Aims and values

QSG is a very practical body designed to encourage organisational development, both collectively and within each Trust. It achieves this by:

- ~ exchanging insight
- ~ identifying the operational goals shared between Trusts and regulators
- ~ developing the expertise of specialist senior staff, especially in the areas of Education, Finance and Human Resources
- ~ undertaking data analysis
- ~ publishing briefings and blogs

The way in which these five activities developed and matured during 2019–20 has occurred at three levels.

- (i) Within each Trust – there has been increased involvement in QSG workstreams, the main benefit being the ability of CEOs and senior staff to triangulate their practice and benchmark it in relation to Trusts of similar kinds.
- (ii) Across the 17 Trusts – priorities have been established in respect of major topics for discussion or communication with the Department for Education, the National Schools Commissioner, the Regional Schools Commissioners, Ofsted, the Education and Skills Funding Agency (ESFA) and other bodies involved in school-level education.

² The origins of The Queen Street Group are described in more detail in the QSG Annual report, 2018–19, pp. 6–7.

(iii) For QSG as an organisation – there has also been a development of infrastructure, with the Group’s formal object “to advance education for the public benefit” particularly in mind.

This last point relates particularly to the shared ethical commitments of the 17 member Trusts and how these are articulated in the QSG constitution.

During 2019–20, QSG’s specific values were enshrined in the formal requirement that each member Trust should adhere to common ethical standards in the provision of high-quality pupil education (*see § 4.2, below*). The standards are described at a general level but have highly practical applications. These include how ethical commitment is communicated and understood within a QSG Trust and how such commitment is reflected in the particular aspects of the work in which each Trust is engaged.

Overall, QSG Trusts reflect a desire to serve a high proportion of children living in disadvantaged circumstances and this is reflected in their having chosen to concentrate on improving schools that, for a range of reasons, have lost their way and require a fresh start (*see § 2.3*).

Queen Street Group Member Trusts and their CEOs (2019–20)		Box 1
▶ Academies Enterprise Trust	Julian Drinkall	
▶ Astrea Academy Trust	Libby Nicholas	
▶ The Brooke Weston Trust	Dr Andrew Campbell	
▶ Cabot Learning Federation	Steve Taylor	
▶ Creative Education Trust	Marc Jordan	
▶ Dixons Academies Charitable Trust	Sir Nick Weller	
▶ Education South West	Roger Pope	
▶ The First Federation Trust	Paul Walker	
▶ Future Academies	Paul Smith	
▶ Lead Academy Trust	Diana Owen	
▶ Leigh Academies Trust	Simon Beamish	
▶ Oasis Community Learning	John Murphy	
▶ Ormiston Academies Trust	Nick Hudson	
▶ South Farnham Educational Trust	Sir Andrew Carter	
▶ Unity Schools Partnership	Dr Tim Coulson	
▶ Ventrus Limited	Gary Chown	
▶ The White Horse Federation	Dr Nicholas Capstick	

The Queen Street Group Board (2019–20)		Box 2
▶ Simon Beamish	Leigh Academies Trust	
▶ Dr Nicholas Capstick	The White Horse Federation	
▶ Sir Andrew Carter	South Farnham Educational Trust	
▶ Sir David Carter (Co-opted)		
▶ Marc Jordan (Chair)	Creative Education Trust	
▶ Libby Nicholas*	Astrea Academy Trust	
▶ Diana Owen	Lead Academy Trust	
▶ Steve Taylor (Vice Chair)	Cabot Learning Federation	
▶ Sir Nick Weller	Dixons Academies Charitable Trust	
Company Secretary: Dr William Richardson (until 31st August 2020)		
* Resigned in December 2019		

2 THE QUEEN STREET GROUP MEMBER TRUSTS AND THEIR SCHOOLS: FACTS & FIGURES FOR 2019–20

In both of its first two years of operation, The Queen Street Group has conducted a census of the 17 Trusts in membership. In this section data generated in May and June 2020 is compared with that collected in November and December 2018 (*with comparable figures for the previous year italicised in brackets*).³

2.1 Overview

PUPILS, SCHOOLS AND TRUST SIZE

- ~ QSG Trusts between them educate **220,331 pupils** (201,237) enrolled across **399 schools** (374)
- ~ The smallest Trust educates 1,600 pupils in three schools within a single local authority
- ~ The largest educates 32,000 pupils in 58 schools across 26 local authorities

GEOGRAPHY

- ~ QSG Trusts are distributed among all eight of England's RSC regions and across several dozen local authority areas.

SCALE

- ~ Trusts educating between 1,000 and 5,000 pupils – four (*five*)
- ~ Trusts educating between 5,000 and 12,000 pupils – nine (*seven*)
- ~ Trusts educating between 12,000 and 35,000 pupils – four (*five*)

PUPIL CHARACTERISTICS

- ~ 16.4% of children in QSG schools have SEND (*national average: 14.9%*)
- ~ 19.0% do not have English as their first language (*national average: 19.4%*)
- ~ 34.2% qualify as Pupil Premium students (*national average: 28.1%*)

DATES OF FOUNDATION

- ~ The various QSG Trusts were founded between 1990 and 2017

2.2 Commentary

The QSG Trusts are highly varied in origin, geography and size and, as such, broadly reflect the range of multi-academy Trusts nationally. However, QSG Trusts are unified in having clear commitments in common, including a majority specialism of improving education for pupils in schools where circumstances are challenging.

The **399 schools** managed by the member Trusts break down as follows:

- ~ Primary schools: 230 (58%) (216: 58%)
- ~ Secondary schools: 146 (39%) (140: 37%)
- ~ All-through schools: 9 (2%) (6: 2%)
- ~ Special schools: 14 (4%) (12: 3%)

The average number of schools in each member Trust is 23, with the actual number per Trust ranging from 3 to 58.

Of the total number of schools, 16 are free schools and 2 are schools of another specialist type (e.g. Alternative Provider, in-house resource unit).

The profile of the **220,331 pupils** (201,237) across each of the QSG Trusts is also highly varied. The average number of pupils in each member Trust is 12,961 (11,914), with the actual number per Trust ranging from 1,626 (1,559) to 31,915 (33,548).

The **type of school** being attended by pupils can be broken down in several ways.

(1) Type of school by **age phase / special provision**

PRIMARY SCHOOL PUPILS:

- ~ 75,204 (34.1%) (67,863: 33.7%), with the actual number of primary school pupils across member Trusts ranging from 1,181 (793) to 13,282 (11,637)

SECONDARY SCHOOL PUPILS:

- ~ 143,530 (65.1%) (132,070: 65.6%), with the actual number of secondary school pupils across member Trusts ranging from 0 to 29,313 (0 to 29,454)

SPECIAL SCHOOL PUPILS:

- ~ 1,577 (0.7%) (1,304: 0.6%), with the actual number of special school pupils across member Trusts ranging from 0 to 573 (0 to 551)

³ The data for 2020 are based on the 399 schools expected to be part of QSG member Trusts by 1 September 2020 (nine of which were due to be transferred to member Trust oversight during June to August 2020). An exception is the data in § 2.2(2) which cover the 390 schools for which QSG member Trusts had formal responsibility on 1 June 2020.

(2) Type of school by **administrative category**

- ~ Sponsored academies: 217 (56%)
- ~ Converter academies: 142 (36%)
- ~ Free schools: 15 (3%)
- ~ Special schools 14 (4%)
- ~ Other (UTC, studio school): 2 (1%)

(3) Type of school by **inspection judgement**

- ~ Outstanding: 68 (17%)
- ~ Good: 218 (55%)
- ~ Requires improvement: 64 (16%)
- ~ Inadequate: 22 (6%)

(In June 2020, 27 schools (6%) were awaiting their first full inspection since joining a QSG member Trust.)

The **demography of pupils** can be broken down as follows.

- ~ **SEND PUPILS** (Special Educational Needs & Disability):
35,111 (16.4% of all QSG pupils) (31,368: 15.5%)
- ~ **EHC PUPILS** (Education, Health and Care plan):
6,251 (2.9% of all QSG pupils) (7,587: 3.7%)
- ~ **MINORITY ETHNIC PUPILS:**
65,302 (30.5% of all QSG pupils) (65,448: 32.3%)
- ~ **PUPILS WHOSE FIRST LANGUAGE IS NOT ENGLISH:**
40,800 (19.0% of all QSG pupils) (41,125: 20.3%)
- ~ **PUPILS QUALIFYING FOR PREMIUM FUNDING:**
73,274 (34.2% of all QSG pupils) (68,594: 33.9%)

When it comes to **geography**, the distribution of QSG Trusts is fairly even across all eight of the districts overseen by Regional School Commissioners.

The varying size of the Trusts means that some are quite localised. 11 of the 17 Trusts have schools in only one region, while one has schools in seven of the regions and another has schools in all eight. Similarly, the spread across local authorities is varied, ranging from a Trust with schools in one authority to another with schools in 26.

2.3 The Queen Street Group and the national picture

Just as the size and shape of the 17 QSG Trusts is highly varied, so is the picture for MATs nationally. In 2016 it was estimated that 80% of MATs managed between 2 and 5 schools, 19% managed between 6 and 11 schools and 5% managed between 12 and 25 schools. Just 13 out of 587 MATs managed 26 or more schools.

Meanwhile, the pupil demographic across QSG schools indicates that children in these Trusts are: as likely to have English as their first language; slightly more likely to have SEND; and considerably more likely to qualify as Pupil Premium students.

Perhaps most significant is the administrative categories of the schools in membership of QSG Trusts. This reflects the priority that these MATs place on working to improve schools in challenging circumstances. Across the academies sector nationally the ratio of sponsored academies to converter academies is 2:8. Across the Queen Street Group this ratio is 6:4.

When these proportions are considered in relation to inspection outcomes QSG member Trusts perform well above national norms in fulfilling their commitment to improve the education of pupils in troubled schools. 77% of QSG schools (a majority of which are *sponsored* academies) have “Good” or “Outstanding” inspection judgements, compared to 85% of academies nationally (where four in every five schools is a *converter* academy).⁴

⁴ For data on the national picture see: Inspection Statistics: LA-Maintained schools and academies, (Liverpool: Angel Solutions, May 2019), p. 3.

3 QUEEN STREET GROUP: ACTIVITIES IN 2019–20

This section summarises the work of The Queen Street Group over the past year. The nature of its activities is described, the results of these endeavours are set out and conclusions are drawn about the effectiveness of QSG’s overall programme of work in 2019–20.

3.1 A year of two halves: from accustomed rhythms to coping with crisis

As with all organisations during 2020, the year was marked across England by a dramatic gear-change in March when “business as usual” was replaced by extreme dislocation. In the case of QSG, the 2018–19 rhythm of a set of face-to-face meetings in London every four months was maintained until late February, before much more frequent online meetings were convened to address the fast-moving challenge of crisis management.

As a result, the Trust CEOs met together once in London before Christmas, cancelled their planned London meeting in March and, instead, moved to online meetings (mainly weekly), of which 16 were held between mid-April and late August. In parallel, QSG’s specialist professional groups (Education, Finance and HR) each held two face-to-face meetings (October and February), before reverting to 6 fortnightly meetings online between April and July.

These more frequent meetings generated a substantial amount of detailed discussion on coping with the COVID–19 crisis, in order to create as much continuity as possible in the education of school-age pupils. Rather than provide a blow-by-blow account of a full-scale crisis in education with its particular frustrations and specific achievements, the reporting which follows presents QSG’s work thematically and in a way which illuminates the switch from customary work routines to crisis management.

The main effect of this gear-change was to confirm the importance of the overarching priority themes developed within QSG over the 18 months to February 2020, while reordering and refining detailed operational priorities in the face of crisis conditions.

3.2 Operations: Queen Street Group practice in Education, Finance and HR

As in 2018–19, a principal QSG activity in 2019–20 has been the operation of three specialist working groups: Education, Finance and HR. Each of these is made up of executives across QSG responsible for directing these operational areas of Trust work.

In 2018–19 meetings were face-to-face in London each term, with two-way briefings between members and guests from relevant national organisations and agencies. In contrast, the past year has seen a change of emphasis with agendas of the now more frequent online meetings increasingly focused on two main themes: managing through the COVID–19 crisis and preparing intelligence reports for the government and its advisers, alongside public “Think Pieces” on educational priorities and opportunities for innovation (*see § 4.1*).

This combination of tasks has had immediate practical benefits. In crisis conditions it is extremely useful to have a reference group against which to test local understanding and operational adjustments, while this very activity has contributed to increased analytical capacity across QSG as part of its contribution to public benefit.

The headline ways in which the work streams of QSG’s three specialist professional groups developed during 2019–20 are now set out.

Education: 2019–20 Overview

Planning

The QSG Directors of Education began 2019–20 with the three challenges they had identified by the end of the previous year:

- i) increased **financial pressure** on academies and Trusts, including disparities in funding (within and across Trusts);
- ii) a continued focus on the **well-being of staff**, while continuing the extra work involved in improving schools in difficulties;
- iii) a fresh focus on the intrinsic **curriculum ethos** of Trust schools (including in small primary schools, at Key Stage 3 (age group 11 to 14) and among: those “disapplied” from the mainstream curriculum; pupils with Special Educational Needs & Disability; and those in alternative provision).

Realignment

In the event, each theme retained its importance throughout 2019–20 but in ways re-shaped during the year by the global pandemic. The underlying **financing** of schools remained stable (compared to other aspects of society) but specific resourcing challenges and priorities emerged to support educational provision among disadvantaged families under “lockdown”. At the same time, staff **well-being** came to the fore in a completely unexpected way as fears for personal safety and widespread professional improvisation in work practices became the norm. Review of the **curriculum ethos** in Trust schools over the medium term was no less important than before, but this necessarily gave way to more immediate concerns about the essential continuity of curriculum provision while schools remained closed.

Revised priorities

By the end of 2019–20 priorities within the QSG Education workstream had been realigned and refined. The upshot was a revised programme of work to be carried forward into 2020–21.

- ▶ Above all, there is the task of maintaining **curriculum continuity** for pupils in each year group, in circumstances where patterns of school attendance will be unpredictable and liable to change at short notice.
- ▶ In addition, work will be required to determine the extent to which **blended learning** (face-to-face vs. on-line, in school and at home) is an expedient for managing through the pandemic or represents the beginnings of an important pedagogic shift.
- ▶ There is also likely to be increased focus on the reliability and timeliness of **formative assessment**.

Finance: 2019–20 Overview

Planning

The QSG Directors of Finance began 2019–20 with the three challenges they had identified by the end of the previous year:

- i) financial disincentives to take on **schools in challenging circumstances**;
- ii) a growing gap in the funding required for **capital projects**, based on the disparity between condition survey requirements and available finance;
- iii) a continuing difficulty in **accurate financial forecasting** due to the frequency of revisions to government spending announcements.

Realignment

In the event, each of these points remains an important challenge but the operational uncertainties and funding improvisations brought about by COVID-19 had a particular impact on the area of **sound budgeting**. In turn, the general disruption drew renewed attention to three fundamental aspects of the sound financial management of schools: (a) the **complexity of financial planning when funding rules are subject to constant revision**; (b) the implications of this for sound financial management (a discipline which maturing MATs seek to refine each year); and (c) the potential for larger Trusts to secure greater financial autonomy for their schools when it comes to **discretionary investment in strategic educational priorities** (in contrast to stand-alone academies and schools under local authority oversight which can become trapped in a predominantly uncertain and reactive mode).

Revised priorities

By the end of 2019–20 priorities within the QSG Finance workstream had been realigned and refined. The result was a revised programme of work to be carried forward into 2020–21.

- ▶ The year will see a continuing need to undertake as **accurate financial forecasting** as continued conditions of uncertainty in school operations will allow.
- ▶ At the same time, the financial discipline of assessing the **viability of taking on new schools in challenging circumstances** and the feasibility of undertaking essential **capital projects** will benefit from further refinement.
- ▶ These tasks should encourage QSG Directors of Finance to stimulate public discussion of one or more **strategic themes**, such as: the most sophisticated ways of managing financial reserves; assessing the varied performance of individual schools in relation to their funding; and determining the additional costs borne by those Trusts which specialise in reviving the fortunes of ailing schools.

HR: 2019–20 Overview

Planning

The QSG Directors of HR began 2019–20 with the three challenges they had identified by the end of the previous year:

- i) the continuing difficulty of **recruiting high-quality prospective teachers**, including those from black, Asian and minority ethnic backgrounds;
- ii) ensuring that Trusts continue to supply support for schools in achieving their aims to **streamline staff workload**;
- iii) exploring more systematically the role of all categories of school staff (teaching and non-teaching) in **institutional performance and development**.

Realignment

In the event, each theme retained its medium-term significance during 2019–20 but was revised in the short term due to the effects of the pandemic. Staff roles to enhance **school performance** necessarily shifted in focus from capacity to bring about improvement over, say, a three-year period to that of securing operational effectiveness on a week-to-week basis. Due to the disruption of COVID–19, ordinary rhythms of **staff workload** became substantially reframed, while the challenge of **recruiting** high-quality teachers showed signs of easing due to wider labour market uncertainty (notwithstanding a need in the short term to accommodate gaps in the usual school practice experience gained by teacher trainees).

Revised priorities

By the end of 2019–20 priorities within the QSG HR workstream had been realigned and refined. The upshot was a revised programme of work to be carried forward into 2020–21.

- ▶ **Employee consultation and communications** will continue to play a central role as operating conditions remain uncertain.
- ▶ **Work roles** will need further reconfiguration, both to include the flexibility to teach pupils online and, when necessary, from home, but also to accommodate the uneven patterns of blended learning that are likely.
- ▶ In addition, the QSG Directors of HR will be looking beyond the pandemic at **future career patterns** for teachers in a society where the expectation of work and workplaces among employees appears to be shifting rapidly.

3.3 Strategy: Queen Street Group CEOs in discussion with national education leaders

Initial planning for 2019–20 envisaged a similar pattern to the previous year of dialogue between QSG CEOs and national education leaders – namely, six face-to-face discussion sessions with prominent guests as to how, in the various areas of education for which they were responsible and expert, MAT operations might be enhanced and refined for the benefit of all pupils.

As things turned out, there was a hybrid pattern of interaction combining face-to-face meetings and more regular online encounters. The result was working sessions of various kinds held with:

~ **Baroness Berridge**, Parliamentary Under-Secretary of State for the School System

~ **Dominic Herrington**, National Schools Commissioner

~ **Natalie Perera**, Executive Director & Head of Research, Education Policy Institute

~ **Alison Peacock**, Chief Executive, Chartered College of Teaching

The face-to-face meetings continued a process developed in 2018–19. This involved discussion to deepen the collective insight of the CEOs about the nature of incremental improvement in pupil education, while also allowing each guest to reflect on adjustments to processes in their own organisation that could assist the QSG Trusts in achieving this shared goal.

Subsequent online meetings were much more concerned with shared perspectives on crisis management under COVID–19. A particular emphasis here was how, in such circumstances, schools managed by MATs might find themselves enabled to improvise confidently in the light of intelligence held across the central executive team in each member Trust.

The main points arising from the work stream followed by QSG CEOs during 2019–20 can be described as follows.

CEO Perspectives: 2019–20 Overview

Planning

The QSG Trust CEOs began 2019–20 with the three challenges they had identified by the end of the previous year:

- i) in concert with many other organisations, reviewing and commissioning examples of **innovation in the ways in which groups of schools can best meet the needs of a fast-changing society**;
- ii) contributing to **coherence** in the structure and operation of the government’s academies programme, especially by suggesting practical refinements to the work of **Regional Schools Commissioners** when it comes to the processes involved in brokering academy sponsorship;
- iii) continuing the task of **explaining to a range of audiences**, professional and lay, what multi-academy Trusts with proven track records and clear ethical commitments are seeking to achieve.

Continued salience

Given their strategic importance, these areas of priority work remained **unchanged** for the QSG CEOs during the year even as, from March 2020 onwards, the pressing challenge of maintaining **continuity of education for pupils** under COVID–19 conditions became the principal short-term objective.

Extension of priorities

By the end of 2019–20, this combination of stability of strategic purpose, alongside the varied effectiveness of national policy responses to the pandemic, had resulted in an extension to the workstream of the QSG CEOs for the year ahead. This now comprised a focus on:

- ▶ the continued generation of pandemic-related and general **intelligence for ministers, their advisers and others**;
- ▶ the provision of **thought leadership for a wider audience** on the evolving role of schools in a fast-changing society infused with digital technologies;
- ▶ a continued focus on **policy and ethical practice within multi-academy Trusts** that undertake the task of improving education in schools in challenging circumstances.

3.4 Reflections on an extraordinary year

The concise summaries of QSG workstreams provided in sections 3.2 and 3.3 outline in only the barest detail the way in which the enduring priorities for the member Trusts interacted during the year with unprecedented conditions of week-to-week operational uncertainty and improvisation.

This interplay had implications at several levels, including for:

~ **operations** – what it means for a Trust to provide appropriate and effective education for pupils, underpinned by sound financial management and the ethical duty of being a fair and progressive employer;

~ **stability** – the extent to which the enactment of a Trust’s strategic plan by its leaders can remain securely on course, even while week-to-week activities are severely disrupted or suspended; and

~ **resilience** – insight as to how those multi-academy Trusts in the hands of capable and experienced trustee boards, can demonstrate constancy of values and optimum deployment of resources in pursuit of education for the public benefit.

At a more detailed level, it was striking how, during the second half of the school year, the impact of the pandemic focused the attention of Education, Finance and HR teams on management challenges that were both interlocking and, at the same time, discipline-specific.

Interlocking challenges

These centred on the organisational priority, shared by QSG member Trusts, of ensuring the educational experience of pupils was maintained as well as possible in logistical terms: which groups of staff and pupils would be working from where; how additional resources such as meal vouchers and computer hardware would reach their intended destinations; how working conditions would be adapted to keep everyone safe; how all of these considerations might create data protection complexities, and so on.

As a result, there were priorities requiring coordinated action from March 2020 onwards within and across the various QSG workstreams.

Discipline-specific logistics, values and priorities

Alongside the generic priorities just described, activity within the operational workstreams led to discipline-specific logistics, values and priorities coming under review and refinement.

EDUCATION

There was considerable uncertainty as to how disruption to learning would affect different types of pupil and whether summative assessment (pupil tests and public examinations) would be held in the summer, as usual. In this sphere of education management there is much published analysis of such matters and this allowed the QSG Directors of Education to issue three Think Pieces on pressing educational puzzles (see § 4.1, below).

FINANCE

As fresh funding announcements and revisions to existing revenue allocations followed in rapid succession, the implications for QSG Directors of Finance responsible for expenditure against budget became more complex. In a sphere of education management where much less is published about effective policy and practice, the QSG Finance group found itself revisiting some basic management principles so as to decide on which specific challenges it would be useful to prepare public discussion papers.

HR

In this sphere of education management the detailed logistics of health and safety, employee consultation and continuity of staffing quickly came to the fore and were accompanied by intensive risk assessments of working conditions. As with finance, less is published about the contribution of HR to school practice and performance but the QSG HR group continued work on one of its longer-standing concerns, the extent to which employment practices in schools are well placed to meet the expectations of more recent generations of graduates as these groups consider their careers of choice.

In the ways described in this section, the working methods of The Queen Street Group remained constant during 2019–20 while proving supple in use. QSG's emphasis on peer-to-peer professional learning and priority-setting stood up well to the overall emergency. Indeed, they came into their own and were notable for a strong and enabling culture of collegiality. It was also striking how the medium-term priorities developed across QSG during 2018–19 remained relevant, even as they were revised and reshaped by the pressing priorities of COVID-19.

4 DEVELOPING THE INFRASTRUCTURE OF THE QUEEN STREET GROUP AS A PUBLIC BENEFIT ORGANISATION

The four infrastructure developments reported in this section were each designed during 2019–20 to strengthen the organisation of The Queen Street Group.

4.1 The Queen Street Group Website

This site went live on 1 May 2020. It presents factual information about QSG and hosts the reports and publications arising from its work. In 2019–20 publications included the first three in a series of Think Pieces offered as stimulus papers for some of the directions in which school education might develop over the next three or four years.

- (1) Thoughts on re-joining and recovering education as we move into a post-pandemic world | Think Piece One (29.4.20)
<https://queenstreet.group/post-pandemic-world/>
- (2) Establishing a strong culture of safety and risk awareness against a background of phased return to school | Think Piece Two (8.5.20)
<https://queenstreet.group/establishing-a-strong-culture-of-safety-and-risk-awareness-against-a-background-of-phased-return-to-school/>
- (3) Closing the opportunity gap for learners with SEND beyond the pandemic | Think Piece Three (30.6.20)
<https://queenstreet.group/closing-the-opportunity-gap-for-learners-with-send-beyond-the-pandemic/>

4.2 Values: The Queen Street Group's formal Membership Requirements

The constitution of The Queen Street Group requires it to have a Membership Committee which oversees the admission of new Trusts and the values to which each member Trust should adhere.

During the winter of 2019–20 the Membership Committee (chaired by Dr Andrew Campbell, CEO of Brooke Weston Trust) developed a formal code for the admission of new member Trusts, along with a set of Membership Requirements binding on each Trust in membership. This code was approved by the full meeting of the CEOs in May 2020.

The main provisions of the Membership Requirements are:

- ~ a ceiling of 25 Trusts in membership at any one time;
- ~ a procedure for admitting new member Trusts in years during which there are one or more vacancies;
- ~ the requirement of all member Trusts to:
 - > adhere to a QSG Statement of Ethical Commitment
 - > adopt formally the framework put forward by the ASCL Ethical Leadership Commission in its publication *Navigating the Educational Moral Maze (January 2019)*
 - > follow the joint guidance issued by The Governance Institute and the Confederation of School Trusts on Organisational Culture in *Academy Trusts (March 2019)*

The Queen Street Group Statement of Ethical Commitment is attached as an appendix on p. 33 of this Annual Report.

4.3 Size: A modest expansion of The Queen Street Group

Having set a membership ceiling of 25 Trusts, in May and June 2020 the existing 17 CEOs sought to expand the Group, with reference to three broad criteria:

- ~ enhancing the geographical spread of existing QSG members;
- ~ increasing the diversity/equality represented among the members;
- ~ maintaining a range of size and shape among Trusts in membership.

As a result, contact was made with six Trusts inviting them to consider the benefits of joining QSG and the Membership Requirements involved. In each case, the Trust concerned responded with enthusiasm to this invitation, with the result that each of the following became eligible to be members of QSG from 1 September 2020:

- ~ Avanti Schools Trust
- ~ BMAT
- ~ Star Academies
- ~ Big Education
- ~ Community Academies Trust
- ~ Summit Learning Trust

4.4 Strengthening the role of the Trust head office function

2019–20 also saw steps taken to strengthen the head office function of Trusts in Membership of QSG through networking among those in a range of roles designed to support the Trust's CEO. Collectively, these role-holders encompass a wide range of duties:

- ~ Clerk to the Board
- ~ Company Secretary
- ~ Line management of clerks for academy governance
- ~ Management of the administrative team in the Executive Office
- ~ Facilities management for the Executive Office
- ~ Leading all of the work in the CEO's office
- ~ Communications management, including for the CEO
- ~ Leadership of administration functions across the Trust
- ~ Management of FOI / SAR / GDPR procedures for the Trust
- ~ With the Trust COO, mitigating risk and managing issues that arise

The network of Executive Assistants met during the year in order to define their contribution to the sound administration of Trusts in the context of school improvement. The initial results of this scoping exercise fall under three headings.

PRINCIPAL CONTRIBUTION OF EXECUTIVE ASSISTANTS

- ~ Sound administration of the reporting duties of a Trust as a not-for-profit company.
- ~ The design of administrative systems that best support the Trust's schools (including software systems).
- ~ Representing administrative staff across a Trust to ensure that, where relevant, the intelligence held by the staff contributes to school improvement plans.

CHALLENGES

- ~ Time management in order to: continuously improve administrative systems; undertake professional development and training; and spend time in schools as Trust employees and volunteers.
- ~ Keeping themselves and other head office administrators sufficiently in touch with schools to appreciate fully the needs of pupils.
- ~ The best use of apprenticeships.

CONTRIBUTION TO SCHOOL IMPROVEMENT

- ~ Ensuring the Trust's moral and ethical vision informs the work of all of its central staff teams.
- ~ Team building, relationship building and strong internal communications within the Trust, aligned to its culture and values.
- ~ Managing central office diaries and working patterns to ensure: senior staff have optimum amounts of time in schools; Trust conferences and events are fully accessible; there is effective communication with staff "on the road"; and senior Trust managers are kept fully apprised of the overall head office contribution.

5 THE QUEEN STREET GROUP: PRIORITIES FOR 2020–21

As 2019–20 came to a close it became apparent that the priorities of QSG's five constituent groups (CEOs, Directors of Education, Directors of Finance, Directors of HR, Executive Assistants/Office Managers) had been marked over the previous two years by an underlying continuity.

As a result, the likely priorities of the various QSG work streams look set to follow a similar pattern in 2020–21, while accommodating the specific operational demands of managing schools during a pandemic.

5.1 CEOs' strategic overview

CONTINUED GENERATION OF PANDEMIC-RELATED AND GENERAL INTELLIGENCE

Both unsolicited and when requested, the CEOs collectively remain well-placed to provide **ministers, their advisers, officials, and Regional Schools Commissioners** with: reliable intelligence on educational recovery following the pandemic; and informed commentary on **coherence** in the structure and operation of the government's academies programme, especially the processes involved in brokering academy sponsorship.

PROVIDING THOUGHT LEADERSHIP

It is likely that the CEOs will continue to oversee the wider work of QSG's specialist groups in producing public papers designed to challenge thinking and promote discussion of **the evolving role of schools** in a fast-changing, digitally enabled society.

REFINING POLICY AND ETHICAL PRACTICE WITHIN MULTI-ACADEMY TRUSTS

The CEOs will also be responsible for the **operational effectiveness** of their own organisations, something which in 2019–20 was considerably assisted through collegiate working within QSG. Having set out a collective **Statement of Ethical Commitment**, an expression of its practical application will continue to be the chosen priority of **improving education in schools in challenging circumstances**, notably those which are sponsored academies.

PROFESSIONAL AND PUBLIC UNDERSTANDING

There is a continued need for the CEOs of leading Trusts to **explain to a range of audiences**, professional and lay, what such organisations with proven track records and clear values are **seeking to achieve**: on behalf of the pupils for whom they are responsible; and as well-governed stewards of public finance.

5.2 Education

The QSG Education group's likely tasks for 2020–21 include:

- (i) **maintaining curriculum continuity** for pupils in all year groups, in circumstances where patterns of school attendance are unpredictable and liable to change at short notice;
- (ii) determining the extent to which **blended learning** (face-to-face vs. on-line, in school and at home) is an operational expedient during a pandemic or represents the beginnings of an important pedagogic shift;
- (iii) supporting staff, pupils and parents in a **collaborative effort** to make school learning as effective as possible under conditions of considerable disruption, both in school and with respect to summative pupil tests and public examinations.

5.3 Finance

The QSG Finance group's likely tasks for 2020–21 include:

- (i) re-conceptualising the task of: balancing **sound financial forecasting** with revenues subject to **continuous alteration** due to political intervention; and the deployment of a Trust's **financial reserves** in a strategic way;
- (ii) reviewing methods of due diligence within Trusts for assessing: **the viability of taking on new schools** in challenging circumstances; and authorising priority **capital projects** in the light of interruptions since March 2020 to the normal procedures and timescales involved;
- (iii) building into financial planning a **clearer understanding** of important dynamics such as: the social and economic value / footprint of schools in their local areas; the varied performance of individual schools in relation to their funding; and the additional costs borne by those Trusts which specialise in reviving the fortunes of ailing schools.

5.4 HR

The QSG HR group's likely tasks for 2020–21 include:

- (i) managing unprecedented **reconfiguration of work roles** in the short term, including the flexibility to teach pupils online and, when necessary, from home;
- (ii) **effective ways of communicating** with school staff (teaching and non-teaching) on a range of new topics, including health monitoring, workplace protocols on health & safety, flexible working practices under COVID-19 and their contribution to school performance and improvement;
- (iii) looking beyond the pandemic at **future career patterns for teachers** in a society where the expectation of work and workplaces among employees appears to be shifting rapidly.

5.5 Head office capacity

The QSG Executive Assistants' network anticipates its activity in 2020–21 as including:

- (i) further **definition of the principal contribution** of the Executive Assistant / Head Office manager role within maturing multi-academy Trusts;
- (ii) greater shared understanding of the contribution of these post-holders to the task of **school improvement**;
- (iii) further **scoping of the challenges** involved in realising these aims.

6 CONCLUSIONS

The second year of Queen Street Group activity has seen the workstreams established in 2018–19 starting to mature. The underlying medium-term goals of QSG Trusts have remained unchanged even while short-term priorities were transformed by crisis management under COVID–19. During the year, maintaining a balance between the immediate pressures of the pandemic and the underlying core purposes of Trusts was made much more effective and collegial for QSG members by the regular meetings across the Group in which shared values were constantly to the fore.

While being of particular benefit to those in its member Trusts, the work of QSG during 2019–20 benefited others including those in government in receipt of QSG briefings and those who interacted, through the website and on social media, with the Think Pieces published in the course of the year. These activities are, of course, a means to the single end that matters most – the quality of education experienced by all pupils.

Undoubtedly, the pupil experience was severely disrupted in the first half of 2020 and 2019–20 can be accurately described as a year of disruption to schools unprecedented in the modern era (the period since 1881 when school attendance became compulsory). The nearest equivalent is the widespread evacuation of city children to the countryside in 1939 but even then, as well as during the flu pandemic of 1919, there was nothing approaching a national closure of schools.

All schools, including those managed by QSG member Trusts, will be working hard in the year ahead to mitigate the worst effects of the recent dislocation, especially for pupils living in disadvantaged circumstances who stand to be among those most affected. In this context, QSG’s member Trusts will continue in 2020–21 their distinctive work of providing a fresh start for schools beginning the road to recovery from recent troubled histories.

APPENDIX

The Queen Street Group: Statement of Ethical Commitment (May 2020)

Multi-academy Trusts (MATs) serve an important public and societal purpose. In an increasingly “academised” system of school governance and management, such Trusts are becoming prime structures through which public education for 5 to 18-year-olds is delivered for the good of society. They are constituted as independent charities but are financed through public funding and must therefore be open and accountable for the money they spend, the outcomes they achieve and the processes by which they operate.

The Trusts exist first and foremost to further the education and life chances of the children who are entrusted to their care. Good education is the greatest enabler of social mobility, of individual success and happiness, and of social cohesion and national economic prosperity. Ensuring high-quality outcomes for children across a range of activities – academic, pastoral, sporting and cultural – is the prime concern of multi-academy Trusts and the executives and non-executives responsible for their direction.

Many Trusts – especially those whose schools are “sponsored” academies – choose to work with children, families and communities in challenging circumstances, whether defined by conventional measures of deprivation or by lack of aspiration or opportunity. Many of the schools run by member organisations of The Queen Street Group have been poorly served by those responsible for them in the past. We are committed to remedying this situation.

Effective and ethical leadership that places positive outcomes for children at its heart is the most important pre-condition for achieving the “moral purpose” of education. As members of The Queen Street Group we think it important to endorse formally two recent frameworks of ethical leadership:

~ ASCL Leadership Commission: Framework for Ethical Leadership in Education; and

~ ICSA/CST Guidance on Healthy Organisational Culture in Academy Trusts.

Finally, the diverse make-up of the membership of The Queen Street Group underscores the benefit of learning from multiple approaches to the challenges of running schools successfully. It is not our intention to be prescriptive. However, we all adhere to the rules and guidelines for the operation of multi-academy Trusts laid down by Government, while seeking to offer examples of best practice in administrative and operational matters worthy of consideration by any similar independent charity whose objective is continuous improvement in these areas, within the framework of ethical leadership and healthy organisational culture.

QSG

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