

QSG

QUEEN STREET GROUP

ANNUAL REPORT

2021 – 2022



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FOREWORD

Welcome to the fourth Annual Report of the Queen Street Group alliance of English Multi-Academy Trusts.

After two years of unprecedented disruption caused by Covid-19, 2021–2022 has seen something of a return to accustomed pre-pandemic rhythms in schools. However, some important aspects of education across our 22 member Trusts have now changed, both for good and ill.

On the upside, we have been inspired by the determination and resilience of those who work and study in our schools and we have welcomed the educational gains brought about by greater use of blended (on-line and face-to-face) teaching and learning.

Of considerable concern, however, is evidence of pupils from all backgrounds for whom loss of schooling during 2020 and 2021 has made life more challenging, coupled with concerns that those from disadvantaged homes may have suffered most from ‘learning loss’.

Late in the year, some of our work on financial modelling (see pp.18–19) was overtaken by unexpectedly high pay awards to be made to teachers and,

potentially, other staff from September 2022 combined with unprecedented inflation in energy costs. Accordingly, the financial outlook for schools for 2022–2023 and beyond is one of considerable uncertainty.

In this report you will find facts and figures about the 220,939 pupils enrolled across QSG’s 409 schools. We report on our main activities during the past year, including focussed analysis on the financing and staffing of MATs, and contributions we have made to the development of national policies for schools and to regulatory review.

We also report on plans to grow the size of QSG itself in the coming year.

In March 2022, the DFE’s White Paper *Opportunity For All: Strong Schools with Great Teachers for Your Child* signalled that MATs are set to play an ever more central role in school education in England. We look forward to playing our part in that process – not least in the specialist work that most QSG member Trusts undertake in supporting schools in the most challenged circumstances.

Queen Street Group Executive August 2022



Rowena Hackwood
Astrea Academies Trust



Marc Jordan
Creative Education Trust



Diana Owen
Lead Academy Trust



Roger Pope
QSG Secretary



Steve Taylor
Cabot Learning Federation

ORIGINS & PURPOSE

Origins

A group of MAT CEOs began meeting informally in June 2015 and then formed a voluntary alliance of Trusts which met regularly over the next three years. In November 2018 this alliance became a formal legal entity – The Queen Street Group – with 17 Trusts in membership.¹ Since then membership has grown to 22 Trusts, with more expected to join during 2022–2023.²

Purpose

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 school education.

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

- Exchanging insight
- Developing the expertise of specialist senior staff, especially in the areas of Education, Finance, Human Resources, EdTech and Estates
- Identifying the operational goals shared between Trusts and regulators
- Publishing briefings and blogs



¹ The origins of the Queen Street Group are described in more detail in the *QSG Annual report, 2018–2019*, pp. 6–7, see: <https://queenstreet.group/wp-content/uploads/QSG-Annual-Report-2018–19.pdf>

² See p.6 and p.20.

AIMS FOR 2022–2023

In June 2022 the QSG CEOs updated the Group's overall aims:

Schools and their Trusts

To **improve the quality of education and opportunity** for all pupils in our schools through mutual intellectual, moral and practical challenge and support, and the implementation of best practice in the ethical and effective leadership of multi-academy trusts.

Wider engagement

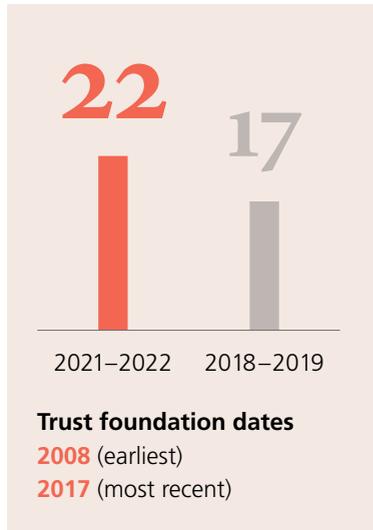
To **engage regularly with policy makers and regulators** to ensure that the practical perspective – both of those responsible for the day-to-day functioning of the schools' system and the views and experience of our pupils – is understood and taken account of in their strategies and operations.



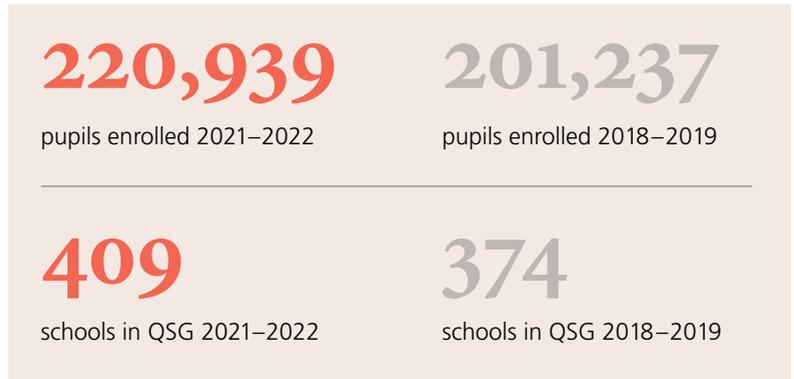
QSG IN NUMBERS

Each year QSG conducts a census of those Trusts in membership. In 2021–2022, the numerical profile of QSG was as follows.

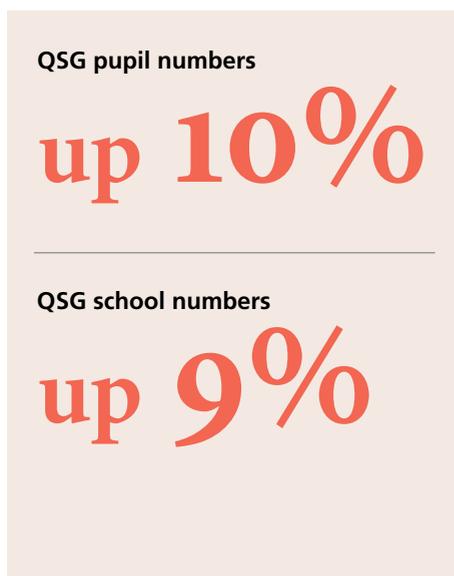
QSG Trusts



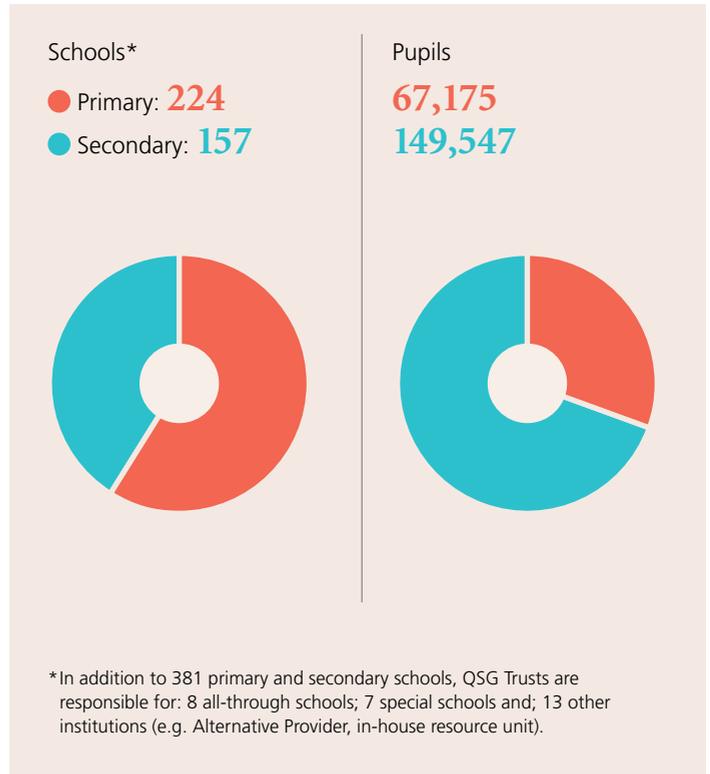
Pupils and Schools



Growth of QSG: 2018–2019 to 2021–2022



QSG Schools and Pupils

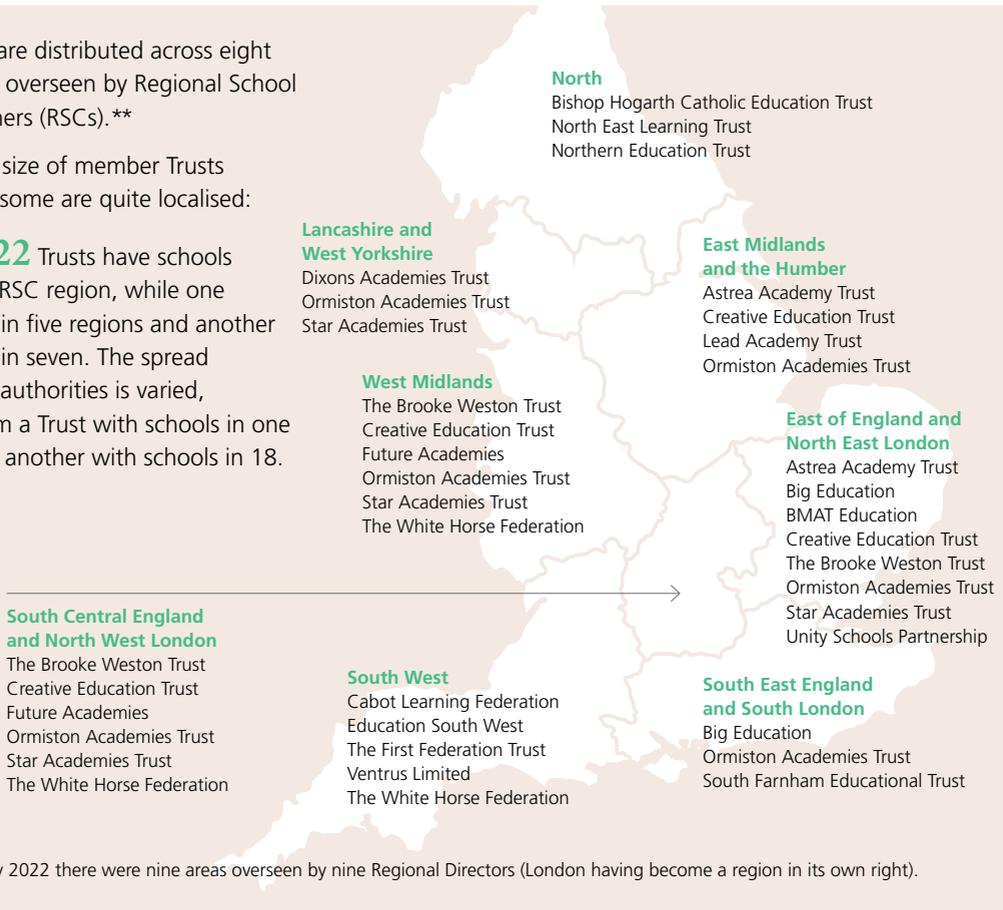


Geography

QSG Trusts are distributed across eight of the areas overseen by Regional School Commissioners (RSCs).**

The varying size of member Trusts means that some are quite localised:

13 of the **22** Trusts have schools in only one RSC region, while one has schools in five regions and another has schools in seven. The spread across local authorities is varied, ranging from a Trust with schools in one authority to another with schools in 18.



Trust Size: Spread

Smallest

1,600 pupils across **4** schools in
one local authority

Largest

33,000 pupils across **43** schools in
eighteen local authorities

Trust Size: Pupils

1,000 – 5,000 pupils

5 Trusts

5,000 – 12,000 pupils

10 Trusts

12,000 – 35,000 pupils

7 Trusts

QSG SCHOOLS, PUPILS AND INSPECTION OUTCOMES

Schools

Compared to England as a whole:

Schools in QSG Trusts are **much** more likely to be **sponsored academies** than in the average MAT

Ratio of sponsored academies to converter academies:

England

2:8



Queen Street Group

6:4



This reflects the priority a majority of QSG Trusts place on working to improve schools in challenging circumstances.

School standards and inspection outcomes

Compared to England as a whole:

QSG Trusts perform **well above** the national norm in improving **educational quality** in schools which operate in challenging circumstances, and this performance is **continuing to strengthen**

This reflects the commitment a majority of QSG Trusts place on improving the education of pupils in troubled schools where family poverty is high:

Ofsted 'Good' or 'Outstanding' school inspection judgements:

➡➡ **QSG schools** (a majority of which are **sponsored** academies): **80%**^{*}

^{*} inspection result since joining a QSG Trust

➡➡ **academies nationally** (where **four in every** five schools is a **converter** academy): **85%**³

Pupils

The pupil demographic across QSG schools indicates that, compared to the national picture, children in member Trusts are:

More likely

➡➡ To be white British

Much more likely:

➡➡ To qualify for the pupil premium

➡➡ Not to have English as their first language.

QSG HIGHLIGHTS

QSG Annual Reception (September 2021)

The QSG year starts each September with a Reception for public figures in English education. This launches the QSG Annual Report, with its review of the past year's activities and priorities for the year ahead. It also allows the CEOs of QSG Trusts to share QSG thinking with the leaders of other prominent educational organisations.

Among the 75 guests at this year's Reception were Amanda Spielman, Dominic Herrington, Andrew McCully and John Edwards representing, respectively: Ofsted; The Department for Education; and The Education & Skills Funding Agency.



Department
for Education



Education & Skills
Funding Agency

Speaking on behalf of QSG, **Steve Taylor** (Vice Chair and CEO, Cabot Learning Federation) set out the Group's key priorities and actions for the year ahead:

Priorities for 2021 – 2022

QSG CEOs:

- ➡➡ Continuous school improvement: in concert with many other organisations, reviewing and commissioning examples of exemplary innovation
- ➡➡ Thought leadership and advice: in particular, insights into the steps needed for educational recovery
- ➡➡ Effective communication: explaining to a range of audiences what proven and ethical multi-academy trusts are seeking to achieve, especially in relation to schools in challenging circumstances

QSG Directors of Education:

To recast provision by MATs for teaching and learning in response to the experience of the pandemic, in support of those who most need catch-up and to make long-term improvements for the benefit of all pupils

QSG Directors of Finance:

To maximise the resource available for teaching and learning in MATs, while running schools effectively and sustainably

QSG Directors of HR:

To support MATs in recruiting, developing and caring for motivated and effective staff.

Also speaking at the Reception was **Professor Becky Francis** (CEO: Education Endowment Foundation) on 'The Challenges of "Building back Better" from the Pandemic'.

Becky emphasised number of key points:

- There is clear evidence of learning loss caused by Covid-19, with gaps in educational opportunity having widened.
- This loss needs to be addressed through short-term and longer-term measures.
- In doing so, it is important to recognise that grade inflation in public examinations in 2021, reflected by Teacher Assessed Grades, served to obscure the reality of learning loss experienced by candidates.
- The pandemic created real capacity issues, illustrating how it is difficult to scale with quality and spend large sums of money effectively during a crisis (MATs have an advantage here).
- Likewise, reflection on 'Building back Better' after the crisis should include:
 - how gains of the pandemic, such as developments in ed tech, do not widen gaps in educational opportunity further
 - a continued focus on the improvement of teaching quality



Also accepting invitations to the QSG Reception were senior figures at:

Ambition Institute; Bates Wells; BBC; Brilliant Club; Catholic Education Service; Chartered College of Teaching; Confederation of School Trusts; Education Endowment Foundation; Education Policy Institute; Fair Education Alliance; Foundation for Educational Development; Independent Schools Council; Pearson; National Association of Headteachers; National Education Union; New Schools Network; Office of the Children's Commissioner; Teach First; Teaching Schools Council; TES.

QSG HIGHLIGHTS

Contribution to Policy Planning: QSG and the DfE White Paper on Schools (December 2021)

Just before Christmas, QSG provided a paper for Whitehall officials designed to assist planning for the March 2022 DfE White Paper *Opportunity For All: Strong Schools with Great Teachers for Your Child*.

A fuller version of the summary that follows is given in Appendix I.

At the time of writing (December 2021) three main themes seemed most important for comment:

- Teaching reforms
- Interventions
- Structures

Our advisory notes did not dwell on what works well in the current system. Instead, they focussed on aspects which we believe would benefit from new or revised policies and procedures.



Teaching reforms

We offered advice on changes to policies that support teachers under the following four headings:

- **Continue** the Early Careers Framework and new National Professional Qualifications.
- **Discontinue** tuition fees for postgraduate initial teacher training.
- **Introduce** new policies for:
 - a funded postgraduate pre-ITT experience year
 - regular protected time for teachers' professional development
 - a new pay scale for teachers undertaking school-based training
 - recognition of the increased time commitment for mentoring/coaching in schools
 - alignment of support for trainers and new teachers in post-compulsory Further Education, apprenticeship programmes and in mainstream state-funded compulsory education
- **Reintroduce** project funding for programmes specifically supporting Equality and Diversity in entrance to, and retention in, teaching.

Interventions

When the Government decides to intervene in the work of multi-academy trusts, it should do so by stating basic principles and following better forms of practice.

Overarching principles

- Interventions by the Government and its agencies should be prefaced by a **clear written rationale** as to need and purpose.
- The default approach should be **cautionary**: intervention can do more harm than good. For example, intervening when a school is on a trajectory of improvement risks halting or reversing gains that have been made.
- Intervention should be **proportionate and subject to regular review**.

Refinements to current practice

- If intervention is for 'turning around' a failing school or MAT, a **clear definition of the failure** is required: simple metrics such as double (or even triple) 'Requires Improvement' Ofsted judgements are too crude.
- The DfE's 'school improvement offer' should include not only experienced and effective school and Trust leaders, but foster system-wide **collaboration to improve**.
- Intervention by Regional School Commissioners should become **more nuanced**.

Structures

When the Government decides to alter national structures of school governance, it should do so by stating basic principles and following better forms of practice.

Overarching principles

- In developing a fully academised school system in England unnecessary **administrative complexity should be removed**, including:
 - any search for the perfect size, minimum or maximum, of a MAT
 - promotion of orthodoxies about MAT organisational modes and management methods
- **Effectiveness** matters more than considerations of scale.

Refinements to current practice

- **Staff in regulatory agencies** (especially the ESFA) should be supported in developing their professional knowledge and skills.
- **RSC regions** should be redefined with London as a region in its own right.
- The **DfE and Treasury** need to secure adequate funds for the transfer of the remaining 'stricken duck' schools to established and well-run MATs.
- We need a realistic level of **capital funding** through the Schools Condition Allocation to meet the major inadequacies in the national schools' estate.

QSG HIGHLIGHTS

HR in the Spotlight: The Younger Teacher in Academy Schools (June 2022)

In March 2021, the QSG Directors of HR posted a blog discussing changes in professional culture at large in England and how these are shaping the expectations and experiences of younger teachers in schools.⁴

The HR expert group revisited this question in the first half of 2022. Drawing on the experience of nine QSG member Trusts, we asked in particular about the extent to which QSG MATs recognise and accommodate the workplace aspirations of today's younger professionals.

The data provided by the nine Trusts broke down readily into three themes. The following summary is taken from more detailed analysis provided in a QSG blog due to be published in September 2022.

1 Today's professional climate and its implications for teacher recruitment

The nine Trusts reported on two aspects of this question.

The work motivations of younger professionals

➡➡ Purpose and motivation in work are the biggest considerations for young professionals who enter teaching in today's environment.

➡➡ There is also a desire among potential recruits for clarity over the likely use of their time in the workplace. Once recruited and in work, the importance of work/life balance is crucial in preventing early burnout.

“Professional development seems key for younger people. Reinforcing their prior sense of purpose and motivation will assist their retention in teaching and in a particular MAT.”

Is teaching an up-to-date profession?

➡➡ Almost all Directors of HR see a tension between the traditional aspects of schools as professional workplaces and the broader career expectations of professionals currently aged 23 to 40.

➡➡ In current marketing of careers in teaching there is little or nothing about technology or work 'flexibility', including working from home where this is preferable and appropriate.

➡➡ There is an increasing urgency for MATs to model flexible working options, such as job shares.

“School education cannot move in step fully with other employment sectors when it comes to new ways of working, due to the nature of its ‘front line’ activities.”

⁴ Preparing for the Next Generation of Teaching: Defining the Employee Experience in the Academy of the Future: <https://queenstreet.group/preparing-for-the-next-generation-of-teaching-defining-the-employee-experience-in-the-academy-of-the-future/>

2

Attracting and retaining good quality teachers

The current recruitment situation

- ➡➡ Pay and customary hours of work across the year remain the most important aspects in attracting capable professionals to enter and remain in teaching.
- ➡➡ The potential for a more flexible working week / term / year, linked to the employee's confidence that such working patterns will remain stable is also important.

“People work as teachers for vocational reasons and are motivated by the work they do rather than simply the pay.”

Can MATs enhance teacher recruitment and retention?

- ➡➡ Achieving this requires substantial engagement by the Trust Board in their MAT's 'People Strategy', or its equivalent.
- ➡➡ MATs have an advantage in that:
 - managers are closer to wider workplace dynamics across schools than local authority staff or the headteachers of stand-alone schools
 - CPD can be provided strategically across schools within a MAT

The challenge of attracting talent

- ➡➡ There are now two keys to recruiting and retaining good quality teachers:

- attracting individuals who wish to develop further their specific curriculum and classroom expertise (something important for the employer to recognise formally)
- providing each teacher with clear role and time boundaries to working life (something of important long-term significance for teacher retention).

“We tend to ‘group’ teachers as a single body. In practice there is a diversity of personal and professional aspiration and, consequently, varying outlooks that heavily influence practice, value sets, teaching methods, resilience toward pupil behaviour, leadership styles, etc.”

3

What might the future hold?

Teachers' work in comparison to other professions

- ➡➡ All QSG Directors of HR see it as important that schools match employer practices in other sectors as a point of necessary self-interest in the competition for recruitment.
- ➡➡ However, it may not be possible or desirable to adopt the much flatter corporate/organisational structures found in other professions. In some important ways schools work within a 'real-time' environment equivalent to medicine and policing.

“It is imperative that we think about how we can be more flexible in order to attract and retain teachers, including through the better use of technology in our teaching.”

QSG HIGHLIGHTS

Thinking about Regulation: QSG and the Bell Review of the Education and Skills Funding Agency (ESFA) (October 2021)

During the autumn term the QSG CEOs compiled a range of key points for the Bell Review. These had arisen in two forums during 2018–2021: in discussions between QSG and ESFA leaders; and in internal QSG sessions convened by the member Trusts' Chief Operating Officers and Directors of Finance.

A fuller version of the summary which follows can be found in Appendix II.



Headline points

There were two standout points in the information conveyed by QSG to the review of the ESFA.

1 The benefits of a more collaborative relationship between the ESFA and those it funds and regulates – something that can be done without impairing the Agency's oversight functions.

2 A sense that ESFA is not sympathetic towards the financial challenges faced by MATs which specialise in taking on schools in challenging circumstances.

More specific points

(i) The role of ESFA within a national system of accountability

- The emphasis of ESFA seems to focus on the policing of expenditure at the expense of the broader goal of enabling purposeful activity to deliver national educational objectives.

(ii) Culture of ESFA and communications with the sector

- It is unclear who is responsible for what within the organisation. Since only those MAT chiefs who know the system well – and are well-connected – have ready access to decision makers this creates inequalities in access to ESFA support.
- MATs are reluctant to bring financial problems to the attention of ESFA because they expect the response to be punitive rather than constructive.

(iii) Structure of ESFA and its operational effectiveness

- The links between the central and regional ESFA staff are not clear; channels of communication are opaque and slow; the paperwork required of MATs (for reporting, grant applications, etc.) is often unduly cumbersome.

(iv) Understanding of the business models of MATs

- Different MATs operate on different business models, something which ESFA and others find hard to understand. Each MAT needs to be judged on the merits of its model, its particular context and the effectiveness of its outputs.
- It is very difficult to construct a well-informed strategic 3-year plan when the most significant funding assumptions are only confirmed from one year to the next. Consequently, even the best-run MATs have difficulty in planning and allocating resources intelligently and strategically.

(v) Attitudes to financial reserves

- ESFA's attitude to financial reserves is not consistent over time. There are many examples of MATs that have been criticised for not building reserves, only to find that once they have done so they are criticised for 'hoarding' funds.

(vi) Attitude to the funding of deficits and capital needs of schools onboarding to MATs

- Because prudent and experienced MAT boards are reluctant to take on large revenue deficits, restructuring costs and capital liabilities that have been incurred by previous managers, the effect of ESFA's current approach to re-brokerage grants is likely over time to encourage the allocation of the most vulnerable schools to the least experienced operators.

(vii) Capital funding

- The quantum of School Capital funding is not adequate to the pressing condition needs of the national schools' estate. A national programme of detailed condition surveys would be a better way of attending to the maintenance needs of schools in England than the current formulaic allocation of annual funding or the use of summary condition surveys.

(viii) School Resource Management Advisor system

- There have been some notable successes in advancing efficiency through this scheme. The quality and experience of the advisors is, however, variable; some do not seem to attend to the relationship between costs and benefits in their proposals.

(ix) Development schemes and grants

- ESFA regularly announces schemes and grants to encourage the development of various kinds of capacity in the sector. However, it is difficult to detect a coherent strategy over time. Many of the schemes are short-lived (with over-elaborate application processes and time-consuming paperwork) and it is difficult to talk directly to knowledgeable officials to help assess the suitability of a proposed scheme.

QSG HIGHLIGHTS

Finance in the Spotlight: MATs and Financial Planning (March–April 2022)

As with HR, there is a very active QSG expert group of Directors of Finance. Among the activities summarised on p. 23, the group gave particular attention during 2021–2022 to the question of sound assumptions when it comes to MAT budgeting and financial planning in the current climate.

There is, of course, plenty of guidance from The Education and Skills Funding Agency about how MATs should structure their financial plans. This QSG project had a different emphasis:

- ➔➔ Discussion of new trends that might invalidate previous approaches to the setting of MAT operating budgets
- ➔➔ Recommendations by QSG Directors of Finance as to reasonable assumptions and multipliers of income and expenditure when populating a secure MAT budget.

These discussions and recommendations are now summarised.⁵

Consensus over some broad trends

Group discussion across QSG Trusts culminated in April, concentrating on three aspects of budgeting and expenditure.

1 Energy costs Shopping around on price at the point of contract renewal will always be a bread-and-butter discipline. However, this is a good time to look at long-term energy usage in schools.

2 Reserves The target level of reserves set by MATs across QSG can vary by up to 2.5 percentage points of turnover. If there is a trend, member Trusts are reducing their previous target for reasons including:

- ➔➔ Potential regulatory penalties
- ➔➔ The urgency of releasing expenditure to address the challenges of pupil attendance, pupil behaviour and staff well-being.

3 New norms in staffing costs It seems the world has changed when it comes to budgeting for staff costs in schools. QSG Trusts have identified components of this change.

- ➔➔ There is now a new ‘normal’ level of staff absenteeism and new ‘normal’ amounts of supply cover, as a result of decreasing social cohesion (e.g., pandemic effects, worsening mental health, pupils in vulnerable households).
- ➔➔ Senior staff in schools have less time to plan and make optimal financial decisions. This is due to time now spent on routine operational firefighting, brought about by less stable staffing conditions and wider societal pressures on pupils.
- ➔➔ Member Trusts agree that the cost of professional support staff will need to rise permanently in order to introduce flexible working and increase pay.

➔ There is also growing consensus that the pay deal for Teaching Assistants is starting to unravel as those in such positions conclude that the additional challenges of 'baked in' pupil behaviour and attendance no longer make the role worthwhile at its current rate of remuneration.

One QSG Trust has modelled the joint effect of these trends on the cost of staff as a proportion of total costs, concluding that it is likely to rise over the next few years from 75% to nearer 85% and then remain at that level.

Dimensions of MAT Income

Budget-setting by MATs requires a full understanding of announced and likely income metrics resulting from:

- * the General Annual Grant (GAG)
- * the Supplementary School Grant (SSG)
- * the Pupil Premium
- * Early Years Funding
- * the Sports Premium
- * the Recovery Premium
- * School Capital Allocation
- * the Devolved Capital fund
- * Universal Infant Free School Meals (UIFSM)
- * Sixth Form funding per pupil

QSG Recommended Cost Assumptions: a checklist

(at end February 2022 and subject to change)

1. Teacher's Pay Award.

Assuming the Government will move towards the £30,000 starting salary ambition, the recommended assumption is to budget for an annual pay award of 3% for any pay points above M4, with a £30,000 starting salary for M1 effective from September 2023. *(In the event, in July 2022 the Government unexpectedly announced what at the time of writing (August 2022) would be an unfunded pay award for teachers of 5%–6% from September 2022. Since this is set against a backdrop of demands from teacher unions for an award more closely linked to current inflation, it remains a live issue being monitored closely by the QSG Finance Expert Group).*

2. Support Staff Pay Award

The recommended assumption is to budget for an annual pay award of 3%. *(This assumption, reasonable in February 2022, was also overtaken in July by the recommendation of a £1,925 award to support staff across all pay points).*

3. Employer Pension Contribution Rates

(a) For support staff pension schemes, consider the likely impact of your tri-annual pension valuations and budget for their introduction from April 2023.

(b) For the Teachers' Pension Scheme, the core assumption is that any potential future increase will be fully funded. However, you should consider the likely impact of any future increases if they are to be funded from within existing budgets.

4. Risk Protection Assurance (RPA)

The RPA rate is £21 per pupil.

5. Non-Staffing Expenditure

Factors to consider when reviewing non-staffing costs include:

- inflationary cost pressures, particularly the impact on gas and electricity which should be reviewed when academies exit any fixed pricing contracts or secure new contracts. *(Global events subsequently caused an unprecedented jump in energy costs)*
- impact of any new Trust-wide contracts
- impact of Covid-19 on any staff absence insurance schemes, lettings income, and catering provision
- staff recruitment challenges and potential use of supply cover
- the tapering impact of the subsidy for the National Tutoring Programme and Academy Mentors, which is expected to reduce to 50% in 2022–2023 and to 25% in 2023–2024

QSG HIGHLIGHTS

QSG Growth and Development Plans (March–April 2022)

The second half of 2021–2022 saw QSG making significant plans for re-focusing its externally facing activities and enlarging the number of Trusts in membership.

In February, the member Trust CEOs considered a commissioned report from Denford Associates on a QSG **Communications Strategy**. This will be based on an unchanging ethos of commitment to ethical leadership and contribution to school improvement, through thought leadership and non-political advice.

When communicating the priorities of QSG member Trusts, eight aspects of educational provision will receive emphasis:

- Curriculum
- Exams and assessment
- Mental health
- Skills development
- Digital learning
- Sex and relationships education
- Student post-school destinations
- MAT strength and sustainability

During March and April, attention turned to a reshaping of the Group's **internal organisation and size**. This review resulted in several important changes, effective from May 2022.

- A restatement of **QSG's purposes**:

1. A primary focus on group support for Trusts in membership, enabling each organisation to remain strong and refine its effectiveness
2. Identifying and celebrating the diverse practices in MATs that lead to success
3. Crystallising these successful practices in written contributions
4. Enabling policy makers and regulators to understand better how their activities enhance (and sometimes impede) MAT success

- The steering of QSG activity by an **Executive Group**. During the final quarter of 2021–2022, the Executive Group members were:
 - Steve Taylor (Chair)
 - Rowena Hackwood, Marc Jordan and Diana Owen (Vice Chairs)
 - Roger Pope (Secretary)

- An intention that QSG should grow in size to **35–40 member Trusts by early 2022–2023**, on an invitation basis and using existing membership criteria. These criteria include:

- *Trust characteristics*: Complementing the overall geography, diversity, size and characteristics of existing member Trusts
- *Trust intentions*: Adherence to specific ethical requirements; the level of attendance expected at meetings; participation in QSG's annual census of schools and pupils



Implications for 2022–2023

Next year the QSG CEOs intend to:

- **Programme activities thematically** so as to explore an educational or managerial topic in detail over several months.
- Through this process, generate among member Trusts new **insights and examples of success**, stimulated by inputs from guest speaker 'experts'.
- Share and discuss the findings with a guest policy influencer and **summarise the results** in a written output.



As part of this thematic activity, the CEOs will also seek to engage with small MATs (both within and beyond the QSG membership), including a focus on sound and successful organisational growth.

Potential themes for 2022–2023



Coming challenges already recognised

by QSG's member Trusts include:

- **Workforce matters** The role of a MAT in recruiting, retaining and developing a diverse and high-performing workforce.
- **Duties beyond education** As health and social care services are increasingly unable to meet demand and Trusts increasingly become more universal providers, how can MATs best work with these agencies to enhance wider provision for children?
- **Greater diversity among CEOs** The March 2022 DfE White Paper (*Opportunity For All: Strong Schools with Great Teachers for Your Child*) identifies the need for a greater number of excellent MAT CEOs who better reflect the demographic of our society. As one starting point for greater diversity, how can MATs establish a more equitable ladder for women progressing to the role CEO?

EXPERT GROUPS (1)

The month-to-month activities of QSG are organised through the work of six expert groups. Four of these groups have been active since September 2018, while two new groups were created in September 2021.

The prime purpose of QSG's Expert Groups is the sharing of knowledge and pooling of expertise so as to strengthen the capability and performance of each member Trust.

CEOs

The QSG CEOs' group met nine times during the year. At six of the meetings guests were in attendance:

Rory Gribble (No 10 Downing Street)
(October, February & June)

Natalie Perera (CEO, Education Policy Institute)
(November)

Sir David Bell (The Bell Review of ESFA) (November)

Baroness Barran (Minister of State)
(December & January)

Sebastian Chapleau (Citizens UK) (March)

Prof Colin Diamond (University of Birmingham)
(March)

Stephen Morgan (Shadow Minister for Schools)
(June)

The CEOs' year was taken up with post-pandemic recovery in schools, especially the needs of vulnerable students. The group also offered detailed insight to those in Westminster and Whitehall preparing an Education White Paper on the role of MATs in English schooling.

As in previous years, the CEOs contributed to discussion and national reviews of the effectiveness of school regulatory bodies. They also discussed a range of other topics: initial teacher training; Teachers' Pay and Conditions; defining a strong MAT; methods in school improvement; women in leadership; and, late in the year, the deteriorating prospect for school funding in 2022–2023.

Education

The QSG Education group met five times during the year.

Of central concern to the group during 2021–2022 were: tackling disadvantage and delayed attainment; the professional development of school staff; and securing academy improvement within Trusts.

In addition, several other themes featured in the group's work:

➡ trends in Ofsted inspection results (showing new patterns of overall outcome for primary and secondary schools)

➡ preparation for summer 2022 public examinations (including contingency measures

if triggered by high levels of Covid-related absence)

➡ the challenge of average attendance levels that before the pandemic would have been considered disastrous (in primary schools rising from 89% in December to 91% in June; in secondary schools rising from 86% in December to 90% in April, before dropping back to 87% in June)

➡ related post-pandemic problems of pupil behaviour in school

➡ the particular needs of vulnerable pupils and those experiencing disadvantage

One of QSG's periodic Education blogs was published in March, on Oracy and the Power of Voice.⁶

EXPERT GROUPS (2)

Finance

The QSG Finance group met five times during the year.

Setting a stable three-year budget in a political environment prone to regular change is a significant problem for MATs. The group undertook a substantial piece of work on this topic, resulting in a blog post in March on reasonable financial planning assumptions for 2022–2023 (as at February 2022).⁷

By mid-year, member Trusts saw utility costs as the greatest financial challenge to remaining within budget. Then, in July, an unexpectedly high pay award for teachers was announced (5%–6%, from September 2022).

The group provided intelligence to the QSG CEOs on less than effective relations with ESFA case workers, particularly where this creates uncertainty concerning acceptable levels of MAT reserves or generates sub-optimal data when a Trust undertakes financial risk assessment prior to taking on a new school.

The group also focussed on procurement, especially how to maximise economy and effectiveness in basic school services (e.g. printing, energy, catering, cleaning, building and legal) and head office tools (e.g. payroll, HR and general management information systems).

HR

The QSG HR group met five times during the year.

High on the group's agenda remained strategic work, begun in 2020–2021,⁸ on recruitment and retention of staff (teaching and support) in a culture of changing attitudes among younger professionals to flexible working, particularly those in specialist non-education roles. This work resulted in clear conclusions arising from a structured survey among QSG members, due to be published early in September 2022.

Other questions occupying the group across the year included: 'long-Covid'; the relationship between pay and performance; the supply of teachers in the context of initial training; employee satisfaction, support and resilience; and promoting a clearer understanding of the HR function in MATs, including its contribution to the effectiveness of schools.

QSG Trusts are at different stages in the development of a People Strategy for their school group but such plans are seen as increasingly important. They require good IT systems and group members regularly discussed the various HR software products available.

⁷ 'Three-Year Financial Planning Assumptions for Academies 2022–2023', at: <https://queenstreet.group/three-year-financial-planning-assumptions-for-academies-2022-2023/>.

⁸ See 'Preparing for the next generation of teaching: Defining the employee experience in the academy of the future' (March 2021), at: <https://queenstreet.group/preparing-for-the-next-generation-of-teaching-defining-the-employee-experience-in-the-academy-of-the-future/>.

EXPERT GROUPS (3)

Estates

The QSG Estates group was created in September 2021 and met five times during the year.

It has identified eight key aspects of Estates work across member Trusts:

- the age and condition of premises
- the School Condition Allocation (value and timing)
- schools with PFI (Private Finance Initiative) histories
- asbestos
- organisation of a Trust's Estates team
- energy (costs and links to environmental sustainability)
- the move to net-zero carbon emissions

The group has also started to examine how these aspects appear in a Trust's annual plan and are reported to the trustee Board.

Two examples of how to frame a holistic approach to Estates management within QSG Trusts are:

Example 1: Annual cycle of work – five complementary aspects:

Staff, student and community experience – space and efficiency – land and properties – compliance and maintenance – resilient business operations

Example 2: Annual cycle of work – seven complementary aspects:

Strategic estate management – overseeing the estate – health and safety – maintaining the estate – understanding land and buildings – energy and water management – projects

EdTech

The QSG EdTech group was created in September 2021 and met five times during the year.

Four work-streams have been established by the group:

- approaches to forming a Technology Strategy
- the future of IT Support
- data & cyber security (risks and mitigations)
- effective CPD and best practice sharing

These have helped initiate debate, discussion and consensus and focussed members' attention on: key interfaces (technical and inter-personal); and dependencies and risks needing mitigation. Policy influencing has also been part of the group's discussions.

Two examples of work-streams under development are:

Example 1: Cyber security

National agencies and schemes help make school less isolated and vulnerable to breaches such as ransomware and phishing (e.g. DfE co-ordination of Risk Protection Arrangements) and there is training accessible through Government's National Cyber Security Centre.

Example 2: Effective CPD & Sharing Best Practice

Good practice principles include the following insights: (a) teaching-led initiatives are more valuable than those led by technology; (b) evidence-based, national benchmarks are better than local perspectives; (c) an enabled classroom allows staff and students to capture what they need in the course of a lesson; (d) CPD should be delivered by a school's own staff, with senior members leading by example.

QSG BOARD 2021–2022

Dr Nicholas Capstick

Sir Andrew Carter

Sir David Carter (co-opted) (until: 3.11.21)

Professor Becky Francis (co-opted) (from: 3.11.21)

Rowena Hackwood

Marc Jordan (Chair until 1.4.22; Vice-Chair from 1.4.22)

Diana Owen (until: 3.11.21)

Natalie Perera (co-opted) (from: 3.11.21)

Lesley Powell (from: 3.11.21; until: 19.5.22)

Dame Maura Regan (from: 3.11.21)

Paul Smith (from: 3.11.22)

Steve Taylor (Vice-Chair until 1.4.22; Chair from 1.4.22)

Sir Nick Weller (until: 3.11.21)

The White Horse Federation
South Farnham Educational Trust

Astrea Academy Trust
Creative Education Trust
Lead Academy Trust

North East Learning Trust
Bishop Hogarth Catholic Education Trust
Future Academies
Cabot Learning Federation
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APPENDIX I

Contribution to Policy Thinking

QSG Commentary in anticipation of a DfE White Paper on schools (December 2021)

Just before Christmas, QSG provided a paper for Whitehall officials designed to inform drafting of the March 2022 DfE White Paper *Opportunity For All: Strong Schools with Great Teachers for Your Child*.

The CEOs in QSG are leaders with significant responsibility for bringing about school improvement 'on the ground'. At the time of writing (December 2021) three main themes seemed most important for comment:

- teaching reforms
- interventions
- structures

QSG's commentary did not dwell on what works well in the current system. Instead, it focussed on aspects which we believe would benefit from new or revised policies and procedures.

Teaching reforms

The following changes would make policies designed to support teachers more effective

Continue The DfE should persist with reforms that have introduced the Early Careers Framework and new National Professional Qualifications.

Remove Tuition fees for postgraduate initial teacher training (ITT) should be discontinued.

Introduce The following new policies should be devised:

- A funded postgraduate pre-ITT experience

year to provide school experience for ITT applicants and additional adult capacity for schools.

- Expectations for regular protected time for teachers' professional development should be set out.
- A new pay scale is needed for teachers undertaking school-based training.
- There should be formal recognition of the increased time commitment for mentoring/coaching in schools for:
 - new teachers and trainees
 - other teachers at all career stages

- Support for trainers and new teachers in post-compulsory Further Education and apprenticeship programmes should be aligned with the support for those in mainstream state-funded compulsory education (as signalled in the January 2021 DfE White Paper *Skills for Jobs: Lifelong Learning for Opportunity and Growth*).

Reintroduce Project funding for programmes specifically supporting Equality and Diversity in entrance to, and retention in, teaching should be reinstated.

Interventions

When intervening in the running of individual schools, the Government should follow basic principles and refine its current methods

Overarching principles

- The DfE and ESFA should provide clarity about why they believe it is desirable to intervene.⁹
- The Government and its agencies should exercise caution; intervention can do more harm than good.
- Intervening when a school is on a trajectory of improvement risks halting or reversing gains that have been made.
- Intervention should be proportionate and subject to regular review. Perpetual

diagnoses of problems and issues will not, in itself, improve a school and leads most often to the failure of subsequent intervention. Establishing a system-wide cross-MAT culture of challenge and support would lead to the system improving itself.

Refinements to current methods of intervention

- If intervention is for 'turning around' a failing school or MAT, then clear definitions of failure are required. Simplistic triggers such as double (or even triple) 'Requires Improvement' Ofsted judgements are not enough: the DfE needs staff capable of making more rounded judgements about schools and Trusts.

- The DfE's 'school improvement offer' should include not only experienced and effective school and Trust leaders, but foster system-wide collaboration to improve.
- Ofsted should maintain its original function as an inspectorate, with no role in intervention other than those required by statute.
- Intervention by Regional School Commissioners should become more nuanced (e.g. greater opportunities to intervene earlier with powers to appoint Trust members and remove Trust chairs; and greater corraling of support from willing MATs rather than jumping to re-brokerage).

Structures

When reshaping the national pattern of school governance, the Government should follow overarching principles while also actively enhancing its institutional capacity

Overarching principles

- In developing a fully academised schools' system in England unnecessary administrative complexity should be removed (including any search for the perfect size – minimum or maximum – of a MAT).
- Effectiveness measured across a range of essential organisational activities matters more than sheer scale.
- The DfE and ESFA officials should avoid promoting orthodoxies about MAT

organisational models and management methods.

- The Government should define the features of a 'strong MAT' in ways that are neither prescriptive nor proscriptive.

Refinements to the institutional capacity of Government

- The Government should make clear its intentions and rationale for a rapid and fair process of further academisation (particularly of primary schools).
- Staff in regulatory agencies (especially the ESFA) should be supported in developing their professional knowledge and skills, thereby fostering greater credibility and trust with MAT leaders and their boards.

- RSC regions should be redefined, with London as a region in its own right and those regions bordering London having their own identity.
- A coherent strategy needs to be developed between DfE and the Treasury to secure adequate funds for the transfer of the remaining 'stricken duck' schools to established and well-run MATs (in tandem with a strategy to secure the future of small rural schools, particularly primary schools, within a sustainable MAT context).
- A review should take place that establishes the realistic level of capital funding through the Schools Condition Allocation required to meet the pressing condition needs of the national schools' estate.

⁹ In some instances there will be wide consensus, such as serious widespread safeguarding concerns, financial impropriety, unsustainable finances on sharply declining educational standards.

APPENDIX II

Contribution to Thinking about Regulation

QSG Notes provided to the Bell Review of the Education and Skills Funding Agency (ESFA) (October 2021)

During the autumn term the QSG CEOs compiled a range of key points for consideration by the Bell Review. These insights had been developed over the three years 2018–2019 to 2020–2021; in discussions between QSG and ESFA leaders,

and in internal QSG sessions convened by the member Trusts' Chief Operating Officers and Directors of Finance.

A synthesis paper forwarded to Sir David Bell in October included the following points.

Headline considerations

1. A more collaborative relationship between the ESFA and those it funds and regulates would greatly benefit the education system and its end users – children and their families. This can be done without impairing the Agency's important oversight functions.
2. The ESFA does not appear sympathetic towards the financial challenges faced by those MATs which specialise in taking on schools in challenging circumstances (see (vi), below).

Specific points

(i) The role of ESFA and its place in the accountability system for schools and colleges

- The emphasis of ESFA seems to focus on the policing of expenditure at the expense of the broader goal of enabling purposeful activity to deliver national educational objectives.
- ESFA has a number of functions additional to financial oversight. For example, the investigation of safeguarding complaints sent to Ofsted seems tangential to its primary role, making it difficult for its 'customers' to understand where its priorities lie.

(ii) Culture of ESFA and communications with the sector

- It is unclear who is responsible for what within the ESFA. Since the system of allocating a named contact to each MAT was abolished, only those MAT chief executives who know the system well – and are well-connected – have ready access to decision makers.
- This creates inequalities in access to ESFA support. It is not clear that leaders within the organisation understand the extent to which this generates unnecessary friction and inefficiency.
- MATs are reluctant to bring the financial problems they face to the attention of ESFA. They expect the response to be punitive rather than constructive, even when problems in a particular school may be beyond their control. This is self-defeating.

(iii) Structure of ESFA and its operational effectiveness

- The links between the central and regional ESFA staff are not clear, channels of communication are opaque and slow, and the paperwork required of MATs (for reporting, grant applications, etc.) is often unduly cumbersome.
- The ESFA weekly update and daily notifications email service are helpful in keeping the sector informed about funding updates. However, it is not easy to refer back and discern how updates fit within the overall library of ESFA documentation. The

various grant schemes are confusing to the non-specialist.

(iv) Understanding of the business models of MATs

- Different MATs operate on different business models, something which ESFA and others find hard to understand. Each MAT needs to be judged on the merits of its model, its particular context and the effectiveness of its outputs.
- It is very difficult for MATs to construct a well-informed strategic three-year plan when the most significant funding assumptions are only confirmed from one year to the next. Consequently, even the best-run MATs have difficulty in planning and allocating resources intelligently and strategically.

(v) Attitudes to financial reserves

- ESFA's attitude to financial reserves is not consistent over time. There are many examples of MATs that have been criticised for not building reserves, only to find that once they have done so they are criticised for 'hoarding' funds.
- It would be welcomed by the sector if ESFA were to give consistent guidance as to what it regards as a prudent minimum level of reserves against unforeseen shocks.

(vi) Attitude to the funding of deficits and capital needs of schools 'on-boarding' to MATs

- There is a lack of realism in ESFA's attitude to the financial costs of on-boarding failing schools. Most mature and well-run MATs have the capacity to deal with complex issues of educational standards. Increasingly their due diligence focuses on financial challenges – both revenue and capital – in assessing the viability of a new project.
- Prudent and experienced MAT boards are reluctant to take on large revenue deficits, restructuring costs and capital liabilities that have been incurred by previous managers.
- The effect over time of ESFA's approach is likely to encourage the allocation of the most vulnerable schools to the least experienced operators who are willing to 'bet the farm' in order to grow their portfolio.

(vii) Capital funding

- The quantum of School Capital Funding is not adequate to the pressing condition needs of the national schools' estate. While that is a political problem not an administrative one, the current formulaic allocation of annual funding is a blunt and sub-optimal instrument.
- Well run MATs with an established estates function use regularly updated professional condition surveys to allocate scarce resource and create a prioritised workstream for their own estates. A national programme of detailed condition surveys would be a better way of attending to the maintenance needs of schools in England than summary condition surveys.

(viii) School Resource Management Advisor system

- There have been some notable successes in advancing efficiency through this scheme. The quality and experience of the advisors is, however, variable; some do not seem to attend to the relationship between costs and benefits in their proposals.
- Many medium to large MATs, have already made significant savings on big ticket items such as power and catering contracts. Sophisticated but practical advice on crystalising marginal savings would be welcomed across the sector.

(ix) Development schemes and grants

- ESFA regularly announces schemes and grants to encourage the development of various kinds of capacity in the sector. However, it is difficult to detect a coherent strategy over time.
- Many of the schemes are short-lived, with over-elaborate application processes and time-consuming paperwork not always appropriate to the rubric of the scheme. It is also difficult to talk directly to knowledgeable officials to help assess the suitability of a scheme to a MAT's needs, and vice versa.
- The ESFA should make explicit its commitment to assisting the MAT sector reach full maturity over a defined period of time, and propose a coherent set of schemes appropriate for MATs at different stages of development.

OUR MEMBER TRUSTS

2021 – 2022



Astrea Academy Trust
Rowena Hackwood



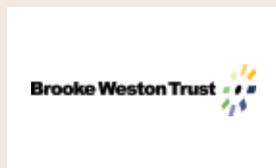
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Liz Robinson and Peter Hyman



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Dr Andrew Campbell



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Philip Hamilton



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Marc Jordan



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Education South West
Matthew Shanks



The First Federation Trust
Paul Walker



Future Academies
Paul Smith



Lead Academy Trust
Diana Owen



Ormiston Academies Trust
Nick Hudson



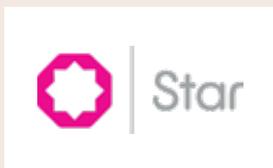
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Lesley Powell



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Sir Andrew Carter



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Sir Hamid Patel



Summit Learning Trust
Catherine Anwar



Unity Schools Partnership
Dr Tim Coulson



Ventrus Multi Academy Trust
Gary Chown



The White Horse Federation
Dr Nicholas Capstick