



Organisation Design and Development

Case Study

1. Schoolsworks

Schoolsworks Academy Trust was established on 1 April 2012 under the Academies Act 2010, to manage its first academy (Edward Bryant School). The Trust grew out of an entrepreneurial vision between the Edward Bryant Head Teacher Cathy Williams and School Governor Chris Seaton, and experienced a speedy organic first stage of growth to 5 schools within two and half years.

The Trust is operating in a demanding environment with high instability and uncertainty. Its great strength lies in its high coherence around core values and mission. It is a Trust “with a cause” that extends beyond the boundaries of excellence in education in the member schools!

2. Project brief



Since its founding, the Trust infrastructure had developed mainly in a reactive way driven by compliance requirements from the Department for Education and Ofsted, and the move to Academy status had a massive if unforeseen effect on the work of the School Business Managers.

Over the year 2014-2015 the Trust management infrastructure was funded through a small 1.8% levy from the member schools in order to keep Trust overheads to a minimum and maximize resources for direct education. Many of the infrastructure support functions had been rolled

forward from the previous Local Authority management under Service Level Agreements.

The Trust leadership recognised however that the infrastructure was unsustainable and they needed to move to “front foot” working to sustain a healthy organisation for the long run. They wanted to do things once and well wherever possible, while sustaining the values of distributed leadership across their member schools.

Tricordant were engaged by Schoolsworks between summer 2014 and early 2015 to undertake an Organisation Design and Development (ODD) review to help consider how the Trust should organise for future growth in terms of the capacity and scope of its infrastructure and functions, while keeping to its core values and ethics.

During the project 2 schools in the pipeline both joined the Trust formally, increasing the number of schools from 3 to 5 in the course of 3 months, meaning the Trust had grown from 420 pupils and £1.7m turnover in 2012 to 2,270 pupils and £10m turnover in two and half years.



3. The ODD process

The process for the review was designed in line with the stated values of the Trust so as to secure engagement and ownership of the review outcomes for the longer term. Transparency from the Trust leadership throughout the process was critical.

The process comprised:

- Document review, including outline financial projections for the MAT to 2020/21.
- A briefing visit for an overview and familiarisation with Schoolsworks.
- Interviews and focus group meetings with key organisational leaders, governors and school business managers.
- A workshop involving a cross-section of leaders and business managers from the 5 schools in the Trust to generate a co-created development plan for the Trust.
- A formal report and recommendations, and half-day meeting with the Executive Committee in preparation for the Board.

4. The outputs and outcomes.

The key output from the project was a formal written report, agreed by the Schoolsworks Board, with a clear development and investment plan that built upon the co-creative process so that the outcomes could be recognised and accepted by all parties.

The outcomes included:

- An agreed set of development priorities across the 5 schools, incorporating professional Teaching and Learning priorities alongside investments in management infrastructure support such as HR.
- Agreement to a set of “ways of working together” at all levels to leverage the collective expertise, knowledge and wisdom across the Trust.
- Agreement from the member schools on the contentious issue of increasing the Trust levy to 4% to fund the development priorities
- An agreed budget for 2015/16 with the re-based Schools subscription levy.
- A clear development plan with 6 workstreams coordinated and led by the CEO.



5. Benefits of the ODD approach

The Schoolsworks leadership took a calculated risk in adopting a bottom-up Organisation Design and Development approach to the work of developing the Trust infrastructure. They found however that the benefits soon outweighed the risk.

Cathy Williams, the Schoolsworks Director of Teaching and Learning, commented:

“Tricordant’s facilitation of the leadership community across the 5 schools, and the engagement methods they used, meant the whole community designed the solutions from within and through collective dialogue. While the co-creative process took longer than a traditional top-down approach, it meant there was much easier sign-up and far less resistance for the solutions when it came to formal decision-making. The solutions will be much easier to implement as a result. Sometimes you have to go slow to go faster!

We would definitely commend this approach to colleagues facing the same austerity challenges as us. We have found it a great investment in both time and money to maximise the effectiveness of our funding for the longer term”.

If you would like to discuss this case study, please contact Roger Greene of Tricordant roger@tricordant.com or Chris Seaton, CEO of Schoolsworks chris.seaton@schoolsworks.org .