

Governance at scale

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Introduction

As the school trust sector continues to consolidate, boards are governing charitable companies of greater size, complexity, and reach than ever before. The [Academy Trust Governance Code](#) sets out principles, desired outcomes, and recommended practice for effective trust governance. The fundamentals that underpin good governance design are consistent across any organisation, but scale introduces risks and complexities that require deliberate and different approaches.

While scale brings opportunities to improve outcomes and resilience, approaches that work well in smaller trusts do not automatically translate to larger, more complex organisations. When governing at scale, we know that complexity can increase faster than capacity, failure occurs when design lags behind delivery, and sustainability depends on planned reinvention rather than perpetual expansion.

During our conversations with governance professionals in school trusts, we have heard first hand that working at scale requires the capacity for cultural integration and proactive stakeholder engagement, alongside technical knowledge.¹ Boards need to be confident that change can happen at scale, and can be managed well. But while existing national guidance acknowledges aspects of growth, it remains limited.

The [Academy trust handbook](#) primarily addresses scale through financial thresholds and compliance requirements, while the [Academy trusts: governance guide](#) makes important, but partial, references to readiness for growth, strategic ambition, and the need for professional governance support and capacity.²

This paper responds to that gap. It provides boards and governance professionals with a principled framework for understanding why governance must change at scale, how good design can assure boards about the benefits of scale while mitigating the risks that scale creates, and what governance designed for scale looks like in practice.³

A note on trusts with a religious character

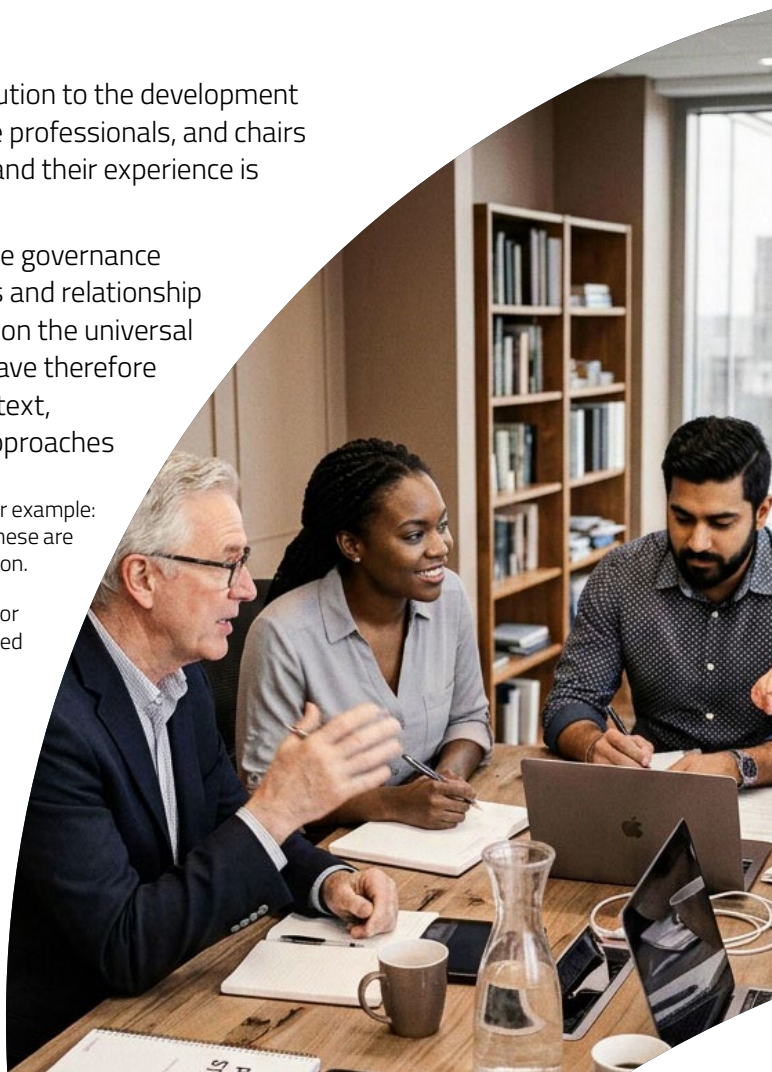
Trusts with a religious character made a significant contribution to the development of this guidance. Many of the leaders, trustees, governance professionals, and chairs who informed our thinking came from faith-based trusts, and their experience is woven throughout the publication.

While trusts with a religious character often have distinctive governance arrangements and terminology reflecting their foundations and relationship with the relevant religious authority, this guidance focuses on the universal principles that underpin effective governance design. We have therefore not made specific reference to faith trusts throughout the text, recognising instead that the principles, frameworks, and approaches

1 Trusts use a range of job titles to refer to the governance professional, for example: clerk, company secretary, governance officer, director of corporate affairs. These are all governance professional roles and sit within the trust's governance function.

2 The *Academy trusts: governance guide* highlights that effective boards factor governance capacity into growth plans, recognising that scale places enhanced demands on governance. Despite this, governance professionals are often brought into growth and scaling conversations too late, excluded from due diligence, and expected to absorb significant additional complexity without sufficient capacity.

3 This paper draws on extensive conversations with governance professionals working in trusts of different sizes and contexts, including faith trusts, specialist provision, and all phases of education. It is also informed by wider research and writing on organisational design, complexity, and scale, which has been used to help interpret sector experience and surface underlying patterns and risks.



described here can be applied within a wide range of constitutional and faith contexts.

Our joint approach

CST and TGP share a long-standing commitment to promoting the importance of trust governance, and this paper emerges from the conversations that we have had over time.

TGP supports governance professionals in the day-to-day of their roles and has the privilege of hearing the careful thought and consideration that these colleagues give to turning guidance into practice. One core question has resounded for governance professionals as they develop governance models: 'Is this scalable?'

CST's [School trust mergers](#) guidance provides a framework for the 'pre-scaling' work that boards need to undertake, helping them navigate growth, mergers, and structural change. This paper builds on that foundation, as well as the [Academy Trust Governance Code](#) and CST's [Next-gen governance](#) work, by focusing specifically on what effective governance looks at scale, and how boards need to adapt their thinking, design, and practice in response.

Why this work is needed

As trusts grow, governance must also shift: moving away from seeking reassurance to obtaining evidence-based professionally-judged assurances. For a time-poor governance community with varying levels of expertise, this kind of deep work at scale can be challenging.

From our joint work across the sector, we know that trusts of all sizes are moving away from traditional short-termist 'command and control' hierarchies towards a stewardship mindset and longer-term thinking. Some trusts have adopted a 'circular' or 'portfolio' model at board level to streamline governance, alongside sharper reporting.⁴ Others are reviewing how their local committees can provide contextual, locality-focused insight to inform deep, community-aware decision making. These practices are all a response to scale and inform this paper.

What we mean by governance

Governance is often understood too narrowly, and its consideration is commonly limited to the work of non-executives, formal board and committee meetings, and the mechanics of compliance and reporting. While these are important, they represent only a small part of the picture.

In practice, governance is present wherever power and authority are exercised, decisions are made, performance is monitored, accountability is held, or stakeholder voice is elevated. This includes the governance activities undertaken by executives, leaders, and teams throughout the organisation as they make decisions, allocate resources, manage risk, and monitor and oversee performance.

Seen in this way, governance is not confined to the boardroom, papers, or meeting minutes. It is a system that runs through the whole organisation, influencing culture, behaviour, and outcomes at every level. All of this is governance.

What we mean by scale

In school trusts, scale is often reduced to headline metrics (such as pupil numbers, number of schools, or financial turnover). Whilst there are specific compliance requirements related to these metrics, in practice scale is better understood as a set of qualitative changes in how an organisation works - not just how big it is.

- **Size:** Scale begins with size - expressed as number of schools, or pupils - but it is not defined by size alone. While larger trusts inevitably face greater governance challenges, two trusts of similar size can experience very different levels of complexity, coordination, distance, and risk.
- **Complexity:** As trusts grow, complexity often increases. This can mean the addition of multiple phases, contexts, and local authorities, specialisation of roles in hubs or across layers, and leaders who may no longer know the whole system directly. Governance needs to be able to coordinate the shift from managing individual schools to managing a system.
- **Distance:** This can be geographical (spread across regions), organisational (number of layers between schools and the board), or relational (level of contact between decision-makers and practitioners, local authorities, MPs, and other external stakeholders). This can risk weakening feedback loops, and decisions that are juxtaposed against the local reality. Governance needs to deliberately compensate for this greater sense of distance.
- **Speed and impact:** Ultimately, in larger trusts, decisions affect more schools and stakeholders at once. This can have an empowering impact to the good.

⁴ CST (2025). [Effective board reporting](#).

But mistakes may also propagate more widely ('systematising error' through centralisation) and changes may take longer to implement and, conversely, they can also be harder to stop. Governance needs to be able to manage the risk of pace versus control.

A trust board will need to be mindful of key inflection points in the organisation’s development. Growth brings step-changes in structural complexity, risk exposure, and regulatory scrutiny that can quickly outstrip governance arrangements. Governance therefore needs to evolve intentionally, ensuring oversight, assurance, and decision making remain proportionate, effective and resilient regardless of size. Reflecting this, we have deliberately chosen not to categorise trust governance models by size bandings, such as by number of schools or pupils. This is because the core principles of effective governance, and the challenges of scaling governance, apply consistently regardless of size. Introducing size-based categories risks imposing a rigid framework to scaled models, rather than exploring governance practices that can flex as complexity increases and that remain reflective of, and appropriate for, an individual trust’s context.

Our theory of change

Good governance at scale is intentionally designed, not inherited or extemporaneous. Change happens when trusts:

- Start with clarity about purpose and the role of governance
- Agree principles to guide decisions about structures, roles, and behaviours
- Design governance for clear accountability and effective information flows
- Invest in the professional leadership required to steward governance
- Adapt systems and processes as the organisation grows and changes

	Done well this looks like	Warning signs
Scale dividend	The trust uses its scale deliberately to move expertise, knowledge, people, and resources to where they can have the greatest impact. Boards can see evidence that scale is generating educational, financial, staffing, operational, and geographical resilience, and that schools and communities are strengthened by being part of a wider organisation that acts as a protective structure and a civic institution.	Scale is treated as an end in itself, with limited evidence that schools and communities benefit from being part of the trust. Expertise remains unevenly distributed, resources follow history or bargaining rather than need, shared services add complexity without improving quality, and schools and communities experience the trust as distant rather than protective and civic in nature.
Stewardship ('stable core')	Shared purpose and strategic intent are over-communicated, routinely surfaced, tested, and prioritised rather than relying on shared memory or individual leadership.	Fragmentation of purpose and identity; schools see themselves as separate from 'the trust', legacy practices and local variation pull in different directions.

	Done well this looks like	Warning signs
Adaptation ('disruptive edge')	The system is capable of learning and redesign, balancing stability with renewal. Sustaining organisational health while creating structured space and mechanisms for reflection, learning, adaptation, and innovation over time.	Ossification, stagnation, and reliance on static governance arrangements with little capacity to adapt; a focus on the short term rather than longer term sustainability.
Governance expertise and capacity	Governance professional has a strategic role in designing structures, information flows, and assurance mechanisms fit for scale. Access to sufficient resources to fulfil increasingly complex function.	Governance professional lacks capacity and resources to oversee multiple layers, resulting in reactive fire fighting and administrative support rather than strategic leadership.
Accountability	Clear, intentional accountability routes, supported by subsidiarity, defined escalation, and visible ownership of decisions.	Loss of proximity and over-mediated oversight leading to 'accountability sinks' and disillusioned stakeholders.
Decision making	Confident delegation with clear guardrails; decisions sit as close as possible to relevant knowledge, context, and those affected, supported by appropriate authority and oversight.	Over-centralisation, indecision, delays and bottlenecks driven by fear of loss of control.
Information flows	Prioritising signal over volume and avoiding delay. Exception reporting aimed at assurance not reassurance and rapid feedback loops that surface issues early and enable timely, proportionate governance response.	Slow, bulky reporting that lacks insight, creates fluffload, and obscures emerging risks and weaker signals.
Information type	Combination of quantitative indicators and qualitative intelligence. Dashboards combined with visits, local insights, external reviews, internal scrutiny reports, stakeholder engagement outcomes.	Over-reliance on key performance indicators and data. Information stripped of context. A focus on measures (easily quantifiable information) rather than conditions and culture (trust, belonging, collaboration, community).
Strategic focus	Structures, agendas, and information flows are designed to keep focus on long-term direction, risk, and organisational health, reporting by exception and insulated from operational pull.	Excessive operational scrutiny, demands for detailed information about individual schools, and backward-looking reporting crowd out strategic thinking and long-term stewardship.
Critical incident response	'Red handles' ⁵ are in place, defined escalation routes to bypass normal processes when risk, harm, or serious failure demands immediate attention.	Critical incidents, risks, or stakeholder issues trapped in normal reporting routes and layers of process, delaying escalation and response.

⁵ Dan Davies uses this 'emergency brake' metaphor taken from the world of trains. Davies, D (2024). *The Unaccountability Machine*, Profile Books. Examples of red handles in practice include [Just Culture](#) reporting in aviation and [Martha's Rule](#) in healthcare.

	Done well this looks like	Warning signs
Coordination	Clear communication and consistent frameworks that allow for context while mitigating variability; interfaces between roles, committees, and layers are intentionally designed to reduce duplication, overlap, and conflicting scrutiny. Resource allocation principles are transparent and understood.	Duplication, 'reinventing the wheel', conflicting scrutiny, inconsistent practices, resource bargaining and perceptions of unfairness emerge as different parts of the organisation work in parallel rather than as a coherent system.
Stakeholder voice	Designed and structurally embedded mechanisms that capture, amplify, and route stakeholder voice to where decisions are made, rather than treated as episodic consultation.	Local voice diluted or tokenistic, with concerns absorbed into process or lost between layers.

Designing governance at scale

Designed well, governance at scale fulfils two related purposes. First, it allows boards to gain assurance that the trust's scale is acting as a protective and civic structure and generating benefits for children, schools, staff, and communities that would be harder to achieve in isolation, including educational, financial, operational, and staffing resilience. Second, governance at scale must mitigate the risks that growth and complexity bring by ensuring that purpose, authority, information, accountability, and stakeholder voice continue to operate effectively across a larger system.

Underpinning both purposes is a deeper challenge: enabling trust at scale. Philosopher Annette Baier describes trust as accepting vulnerability by placing something of value in another person's power.⁶ In smaller organisations, trust is often sustained through personal relationships, direct knowledge, and proximity. As organisations grow, these foundations become harder to maintain. Trustees can no longer know every school, leaders cannot personally oversee every decision, and stakeholders become further removed from those exercising authority.

Governance is one of the primary ways organisations create the conditions for trust at scale. Clear accountability, effective delegation, reliable information flows, meaningful stakeholder voice, and a shared sense of purpose all help people place confidence in decisions made by others whom they may never meet. In this sense, governance at scale is not merely a mechanism for oversight. It is a means of creating trust across distance, complexity, and time.

⁶ Baier, A (1986) 'Trust and Anti-trust', *Ethics*, Vol. 96, No. 2, pp. 231-260. University of Chicago Press.



Assuring the benefits of scale – the ‘scale dividend’

One of the defining questions for trusts is not simply whether individual schools are performing well, but what the organisation enables them to achieve together that would be harder to achieve alone. Externally, this manifests as a trust’s ability to act as a civic institution, contributing to wider civic and community outcomes. Internally, this focuses attention on the trust’s ability to deploy expertise, develop leaders, realise economies of scale, distribute resources according to need, share effective practice, and build long-term resilience across its schools and communities.

Discussions about scale can become overly simplistic, presented as either a virtue or a problem in itself. In practice, both large and small organisations bring distinct advantages and challenges. Larger trusts may benefit from greater expertise, capacity, and resilience, while also facing the risks of increased complexity and bureaucracy. Smaller trusts may be more agile and closer to their communities, but can have less access to specialist support and fewer resources to manage unforeseen pressures. The key question is therefore not whether an organisation is large or small, but whether its scale is appropriate to its context, capacity, geography, and strategic purpose.

Civic leadership and place

As trusts grow, they often acquire a level of permanence, visibility, convening power, and organisational capacity that individual schools rarely possess. CST’s work on civic trusts argues that school trusts are not merely educational institutions but increasingly important civic institutions, rooted in the communities they serve and connected to wider networks of public, voluntary, and private sector partners.⁷ Scale can therefore enable trusts to contribute to outcomes beyond the organisational boundary, helping to strengthen the places in which children and families live their lives.

This does not mean that trusts are responsible for solving every social challenge in their communities. Rather, scale creates the capacity to work collaboratively with others around shared outcomes. A larger organisation can sustain long-term partnerships, contribute leadership capacity, convene local actors, and invest in relationships that an individual school may struggle to maintain alone. Through this civic role, trusts may help improve educational coherence, support workforce development, strengthen local services, or create opportunities for children and families that would not otherwise exist.

Boards will want assurance that the trust is using its scale, relationships, and influence to contribute positively to the communities it serves, including:

- Partnerships that improve opportunities and outcomes for children beyond the classroom
- Effective relationships with other civic institutions, including local government, health partners, employers, universities, and community organisations
- A growth strategy that strengthens its ability to serve communities and contribute to place
- Broader outcomes that reflect its contribution to community flourishing and public value.

⁷ Cruddas, L (2026). [The civic trust: Place, devolution and the next chapter for education](#). CST.

Organisational resilience

Governance at scale should provide boards with an understanding of whether the trust has the organisational capability to deliver benefits that schools would struggle to achieve independently. Boards will want assurance that:

- Expertise is moved to where it is needed most
- Leadership capacity is developed and renewed through succession
- Resources are deployed according to need rather than historical allocation
- Knowledge about effective practice is transferred and retained when individuals leave
- Operational resilience is achieved through economies of scale and expert-led high quality shared services
- Schools are strengthened by being connected to something larger than themselves

Scale dividend	Questions for the board
Educational resilience	Is expertise reaching the schools that need it most? Are strong schools strengthening weaker or more isolated schools?
Financial resilience	Are economies of scale and collective resources creating greater value than schools could achieve individually?
Staffing resilience	Are career pathways, succession planning and workforce deployment operating across the trust?
Operational resilience	Are shared services improving quality, consistency, and risk management?
Geographical resilience	Does our footprint strengthen our ability to serve communities, facilitate collaboration, and sustain provision?

Scale dividend in practice: safeguarding

Safeguarding provides a strong example of how scale can create organisational capability that would be difficult for individual schools to achieve independently. CST’s Safeguarding at scale argues that simply replicating a single-school safeguarding model across multiple schools misses the opportunity that scale creates.⁸ Trusts can use their size to build specialist expertise, strengthen governance and assurance, improve consistency of practice, share intelligence, and provide dedicated leadership capacity focused on safeguarding.

Boards will want assurance that the trust is developing central safeguarding leadership, creating professional networks for designated safeguarding leads, establishing clearer escalation pathways, and building stronger relationships with external agencies across multiple localities. This creates the conditions for safeguarding professionals to operate as a single team rather than a collection of isolated practitioners. Scale can therefore improve not only efficiency and consistency, but ultimately outcomes for children through earlier identification of risk, stronger professional support, and more effective organisational learning.

8 CST and Browne Jacobson (2024). [Safeguarding at scale](#).

Mitigating the risks of scale

Stewardship and adaptation

Scale heightens the importance of long-term stewardship. Short-term optimisation carries greater and more distributed risk. Governance at scale must therefore balance stability with renewal, the 'stable core' with the 'disruptive edge', sustaining organisational health while creating structurally-embedded space for learning, adaptation, and innovation over time.⁹

Risk: Loss of alignment and shared identity

As trusts grow, maintaining a shared identity becomes more challenging. The informal relationships, shared experiences, and direct communication that help create a strong sense of collective purpose in smaller organisations inevitably weaken over greater organisational and geographical distances. Without deliberate effort, schools can begin to see themselves as separate from the wider organisation, and language shifts from 'we' to 'they': 'the trust has decided' rather than 'we have decided'. Over time, this can lead to fragmentation of culture, inconsistent decision making, and an erosion of the sense of common purpose that underpins an effective organisation.

Mitigation: Over-communicating identity and purpose

To maintain organisational alignment, governance at scale requires structured and repeated communication of identity and purpose, ensuring that decisions taken across the system remain anchored in a common understanding of why the organisation exists and what it is trying to achieve. One trust describes this as "over-communicating clarity": a deliberate strategy of repeatedly reinforcing mission, values, priorities, and ways of working, recognising that organisational alignment cannot be assumed as distance and complexity increase. (See also 'Coordination, coherence, and resource stewardship' below)

Over-communication must also include storytelling. Trusts must become better at making visible what schools, staff, pupils, and communities gain from belonging to the organisation: the expertise shared, opportunities created, resources deployed, and challenges overcome together. By connecting purpose and values to lived experience, the trust can help schools recognise themselves in its wider story and understand the contribution they make to it.

Risk: Ossification

In his book *Scale*, Professor Geoffrey West explains that large organisations do not grow indefinitely through scale efficiencies alone.¹⁰ Longevity is not dependent on continuous linear growth, but periodic reinvention. Organisations at scale experience "inevitable ossification" where "change, adaptation and reinvention become increasingly difficult to effect." They stagnate unless they continually reinvent and adapt how they organise people, ideas, and resources.

9 Hill, A (2023). *Centennials: The 12 Habits of Great, Enduring Organisations*. Cornerstone Press.

10 West, G (2018). *Scale: The Universal Laws of Life and Death in Organisms, Cities and Companies*. Weidenfield and Nicolson.

For trusts, while early growth brings benefits – stronger procurement, pooled expertise – these advantages can plateau and then reverse as organisational complexity increases. This suggests that sustainability lies less in size and more in structural renewal – for example, redefining the remits of shared services, creating clusters, or redesigning local governance frameworks.

Moving from a small trust to a large multi-layered organisation is therefore not just more of the same. Trusts often fall into the trap of ‘adding one more school’ without rethinking their systems; the cumulative impact of this can be significant and where it happens, governance models that used to work before start to fail.

Mitigation: Structurally building in learning and adaptation

At scale, learning and adaptation need to be structurally embedded. Horizon scanning, governance reviews, innovation projects, stakeholder listening, and strategic reflection require dedicated time and attention if they are not to be crowded out by immediate operational priorities. Sustainable organisations treat adaptation as a core function of governance rather than an occasional exercise.

In practice, this may include establishing dedicated working groups or forums focused on innovation and organisational learning, creating protected space for leaders to explore emerging challenges and opportunities, or forming temporary cross-functional groups tasked with solving strategic problems. One trust has established ‘transformation circles’: small groups bringing together colleagues with the greatest expertise to drive improvement, innovation, and organisational adaptation. These structures recognise that renewal rarely happens by accident; it requires deliberate investment in the organisation’s capacity to learn, redesign itself, and respond to change over time. (See ‘System four: Strategic intelligence and adaptation’ below)

Accountability

Risk: Loss of visibility and ‘control’

A defining challenge of governance at scale is accepting that complete visibility is neither possible nor desirable. Boards cannot govern a large and complex organisation by attempting to retain direct oversight of every school, decision, or interaction. Instead, stewardship requires the maturity to let go of the illusion of complete knowledge whilst remaining deeply connected to the organisation’s purpose, people, and culture. The question therefore shifts from “How can we know everything?” to “How can we create confidence that important things will be known?”

Perhaps counter intuitively, one of the greatest risks of scale is not loss of control but overreaction to the fear of losing control. Faced with greater organisational distance, boards (and executive teams) can be drawn towards more reporting, more approvals, and greater involvement in operational matters in an attempt to retain visibility.

Governance professionals have told us that scaling requires a shift from ‘knowing every story’ to building a robust infrastructure and a ‘culture of confidence’ where assurance is found through systems rather than personal proximity to individuals, settings, or issues. In healthy organisations, assurance comes not from seeing everything, but from knowing that the system will surface what matters.

Mitigation: Letting go with intent

Control does not scale. As organisations grow, governance must become more strategic, delegating authority deliberately while retaining strong assurance. Letting go with intent means clear delegation, proportionate oversight, and a growing tolerance for ambiguity and complexity. Attempts to govern at scale through retained control quickly create bottlenecks, erode decision quality, and stifle innovation and creativity.

Delegation is a design choice. At scale, decisions should sit as close as possible to relevant expertise, supported by clear expectations about consultation, escalation, and accountability. Subsidiarity with purpose enables responsiveness while maintaining trust-wide coherence, avoiding both over-centralisation and unstructured autonomy. Quality delegations will consider the following three tests:

- **Legitimacy:** Does the decision maker understand the perspective of key stakeholders affected and have a clear and visible line of accountability? Are they close enough to the problem to understand real-world trade-offs, and able to genuinely own the consequences of the decision?
- **Location:** Does the decision sit where the problem actually exists (not just where it is reported), the resources being committed are controlled, and where authority, responsibility, and impact are aligned?
- **Capability:** Does the decision maker have the ability to formulate decisions through expertise, advice and consultation, information, time, and cognitive capacity, as well as to execute decisions through control of resources, authority to act, and ability to course-correct?

Risk: Accountability sinks

A key risk at scale is the creation of ‘accountability sinks’.¹¹ As decision making is distributed across layers, roles, functions, and formal processes, responsibility can become blurred or displaced, leaving stakeholders passed from person to person with no clear answer or owner. This not only weakens organisational grip, but also creates frustration and loss of confidence among parents, staff, and communities.

To illustrate, a parent querying a uniform requirement may be told that the school is following trust policy, while the trust then explains that trust policy follows government guidance and local implementation is delegated to the school. Each response may be technically correct, yet the parent is left without a clear decision-maker or meaningful accountability.

Mitigation: Human-centred and visible accountability

Effective governance at scale requires deliberate design for accountability, with clear ownership, understood escalation routes, and assurance that issues cannot disappear into the gaps between structure and practice. But the antidote to an accountability sink is not simply a clearer process. It is making sure that responsibility has both a visible owner and *a visible human being* attached to it. Complex organisations can appear faceless from the outside, yet every complaint, concern, or request is ultimately handled by good people trying to exercise judgement and fulfil their responsibilities well. Thoughtful governance can help ensure that organisational processes remain

¹¹ Davies, D (2024). *The Unaccountability Machine*. Profile Books. When structures absorb or obscure the consequences of a decision such that no one can be held directly accountable for it.

human-centred, allowing stakeholders to see not only where accountability sits, but also the people who carry it.

Information

Risk: Slow, noisy, and overly operational reporting

Lengthy board packs, detailed operational updates, and extensive data can bury important signals beneath routine activity, making it harder to identify emerging risks, opportunities, and areas requiring attention. As trusts grow, reporting must become more strategic and selective, focusing on organisational health, key risks, trends, exceptions, and areas requiring board attention. Effective governance depends not on the volume of information available, but on the ability to identify and act upon what matters most. Delay is also a material risk at scale. Boards are frequently relying on lagged information that reflects what was happening weeks or months earlier rather than what is happening now.

Mitigation: Rapid feedback and 'red handles'

Effective governance prioritises timely, honest, and unfiltered feedback, supported by triangulation and challenge. Assurance comes from aggregated insight and signal quality, not report volume. As organisational distance increases, governance arrangements need to focus on shortening feedback loops so that emerging issues can be identified and acted upon before they become entrenched. (See 'Refined board reporting' below)

In large systems, effective governance depends on 'red handles' - clear mechanisms to interrupt normal decision-making pathways and escalate to ensure that critical intelligence, risk, or stakeholder concern can reach the board without being absorbed into layers of process or reassurance. Thoughtfully designed escalation pathways are one way trusts can give practical effect to the Academy Trust Governance Code's expectations on openness, challenge, and speaking up, particularly as organisational complexity increases.

Risk: Over-reliance on KPIs, metrics, and data (and AI)

As trusts grow, the board inevitably becomes more reliant on information that can 'travel' across greater organisational distances. Trustees can no longer know every school, every stakeholder concern, or every local context directly. Dashboards (increasingly including AI-generated insights), KPIs, RAG ratings, compliance frameworks, and board reports therefore become increasingly important. They provide a shared language through which patterns can be recognised and information can be communicated, compared, aggregated, and scrutinised across multiple schools and layers of the organisation. In this sense, metrics solve a genuine governance problem: they allow boards to govern systems that are simply too large to observe directly. *However*, the very qualities that make metrics and data powerful also create risks.

First, information that travels well must, by definition, be simplified, standardised, and stripped of much of its local context.¹² This inherent trade-

¹² Porter, T (1995). *Trust in Numbers: The Pursuit of Objectivity in Science and Public Life*. Princeton University Press. Porter's portability theory of quantification notes that metrics gain influence precisely because they

off between portability and precision means that, paradoxically, the measures that appear most objective and universal can sometimes be the furthest removed from what is actually happening on the ground.

Second, as Goodhart's Law tells us: 'When a measure becomes a target, it ceases to be a good measure.' Over time, organisations can begin to mistake what is measurable for what matters, a phenomenon Jerry Muller calls 'metric fixation'.¹³ Going one step further, philosopher C. Thi Nguyen observes that metrics can gradually change what people value, a concept he calls 'value capture'.¹⁴ The phenomenon of value capture can happen with both internally- and externally-set metrics: the tendency for a measure, target, or score to displace the underlying values and purpose of the organisation.

Third, measurement is not cost-free. The collection of data consumes organisational capacity, and every metric ultimately depends on somebody entering, analysing, validating, or reporting information. These requirements frequently flow down through the organisation to classroom and school level, creating hidden costs in workload, morale, time, and lost opportunities to focus on teaching, learning, and improvement. Governance at scale therefore requires boards to scrutinise not only what a measure tells them, but whether the insight gained justifies the cost of collecting it.

Finally, many of the outcomes that trust boards care most deeply about are difficult to capture through a dashboard: trust, belonging, healthy cultures, professional collaboration, community confidence, and the quality of relationships between schools and the wider trust. These are what Nguyen describes as 'self-effacing' ends. They cannot simply be mandated or measured into existence; they emerge from the conditions an organisation creates.

Mitigation: Preserving judgement and multiple forms of evidence

Governance at scale requires boards to resist the temptation to substitute measurement for assurance. Metrics, dashboards, and AI-generated insights can provide valuable visibility across complex organisations, but they are only one form of evidence. Effective governance combines quantitative indicators with professional judgement and richer qualitative intelligence, including school visits, local governance insight, external review, and direct engagement and listening exercises with pupils, families, and staff.

The purpose of governance is not to collect ever greater quantities of information, but to develop confidence that the organisation is healthy, effective, and aligned to its purpose. Boards should therefore cultivate the habit of asking not only what information is present, but what may be absent, hidden, delayed, or difficult to quantify. Exception reports, stakeholder voice, external reviews, site visits, professional narratives, and local intelligence all help reveal aspects of organisational life that standardised metrics cannot fully capture. Trust, culture, belonging, professional collaboration, and community confidence rarely appear neatly on a dashboard, yet they often provide the earliest signals of emerging strengths or concerns.

As trusts increasingly adopt AI-enabled tools, preserving the organisation's capacity for judgement becomes even more important.¹⁵ AI may assist by generating information, identifying patterns, highlighting anomalies, or presenting options for consideration. It cannot determine what matters, reconcile competing values, exercise accountability, or make moral

are portable and comparable, not because they fully capture reality. They are 'technologies of distance'.

13 Muller, J (2018). *The Tyranny of Metrics*. Princeton University Press.

14 Nguyen, C (2026). *The Score: How to Stop Playing Someone Else's Game*. Penguin Random House UK.

15 Sadeghi, S and Wathen, J (2026), *Governing AI in school trusts*. CST

judgements about the right course of action. At scale, effective governance depends not on choosing between data and judgement, but on ensuring that human judgement remains sovereign.

Coordination, coherence, and resource stewardship

Risk: Lack of coordination and consistency

At small scale, alignment, consistency, and coordination are often maintained through proximity, informal relationships, and frequent interaction. As organisations grow, these mechanisms become less reliable. Different parts of the trust may develop their own practices, priorities, and interpretations, creating duplication, inconsistency, and organisational friction.

Variability is not inherently problematic. Some variation reflects local context and can be a source of innovation and responsiveness. The challenge is distinguishing between purposeful variation and unhelpful inconsistency that weakens organisational coherence, hinders learning, or creates duplication.

Scale also increases the likelihood of resource bargaining. Decisions about the allocation of funding, staffing, expertise, capital investment, and central services affect a wider range of schools with different needs and perspectives. Allocations that appear equitable at a trust level may not always feel equitable locally, particularly where the rationale for decisions is not visible.

Mitigation: Coherence without uniformity

Governance at scale therefore requires deliberate coordination. Shared frameworks, common language, agreed ways of working, and transparent decision-making processes help maintain organisational coherence without resorting to ever-growing layers of approval or control.

However, all organisational tools involve trade-offs if used bluntly. Trust-wide templates and processes can create coherence but they can also limit responsiveness to local context and stifle adaptation. Subject network can connect and mobilise expertise or just generate activity without impact. Monitoring frameworks can deepen organisational understanding and support improvement or encourage performative compliance. The challenge for governance is therefore not *whether* to standardise, but *what* to standardise (and to what degree) and *how* to standardise.

Drawing on Lorraine Daston's work¹⁶, Nguyen explains that different activities and competencies require different types of 'rules'. Some areas are best governed through *principles*, where professional judgement, adaptability, and sensitivity to context are paramount. Others benefit from *models* that exemplify principles while still allowing discretion in their application. In a smaller number of areas, particularly where the consequences of inconsistency, bias, or error are high, *mechanical rules* and mandatory processes may be appropriate.

As capability and professional expertise develop, organisations can often rely more heavily on principles and judgement, and less on prescription. Less experienced practitioners may benefit from clearer processes and tighter guardrails, while experienced professionals often require greater agency to exercise expertise effectively. Governance at scale should therefore seek to create clarity about purpose and expectations while avoiding unnecessary

¹⁶ Daston, L (2022). *Rules: A Short History of What We Live By*. Princeton University Press.

prescription.

Where they add value, clear expectations and standardisation can support consistency, interoperability, and trust-wide learning, particularly in areas such as policy management, governance cycles, data, and reporting. At the same time, governance should preserve sufficient flexibility for schools and leaders to use their expertise and respond to local context. (For examples, see 'Managing panel workload through resolutions teams', 'Policy management', 'Standardising governance cycles, agendas, and records', and 'Standardising data systems to obtain local assurance' below)

Transparency is equally important. Clear principles for resource allocation, together with open communication about how decisions are made, can help build understanding, trust, and confidence across the organisation. The objective is not uniformity, but coherence: enough consistency to act as one organisation, while retaining sufficient flexibility to respond to difference.

Stakeholder voice

Risk: Diluted stakeholder voice

As organisations grow, there is a risk that stakeholder voice becomes diluted by distance, layers, and process. In smaller trusts, trustees and executives may have direct contact with pupils, families, staff, and local communities. At scale, those relationships inevitably become more indirect. Information must travel through multiple layers before reaching decision makers, increasing the risk that important perspectives are filtered, summarised, delayed, or lost altogether. Stakeholders begin to feel unheard and alienated, while boards may receive only partial or highly mediated accounts of concerns, experiences, and emerging issues.

Mitigation: Structured mechanisms for capturing and amplifying voice

The answer is not to simply send out more surveys, but to ensure that stakeholder voice can travel effectively through the organisation and reach the point at which decisions are made. Governance at scale must include visible, structured mechanisms for listening to, capturing, and elevating voice, including the perspectives of pupils, families, staff, and communities. Boards need reliable ways to hear stakeholder voices to demonstrate how that insight informs decision making, whilst ensuring that reporting is pragmatic and does not overwhelm. (See 'Refocusing the role of the local committee' below)

Leading governance at scale

Governance at scale is not simply about redesigning structures and processes. It is also about evolving roles, redefining relationships, and adapting leadership styles. It is a cultural system, shaped by how power is exercised, how assurance is provided, how challenge is handled, and how trust is built. As scale increases, the roles of members, trustees, executives, and governance professionals evolve, requiring greater clarity and maturity in how authority and accountability are shared.

The evolving role of members

As trusts grow, members become increasingly important as guardians of the trust's mission and values, constitutional purpose, and organisational integrity. Their role is not to replicate trustee scrutiny or become involved in operational matters, but to provide long-term stewardship and an additional layer of accountability. Effective governance at scale depends on members who are informed, engaged, and capable of holding trustees to account whilst remaining appropriately distant from day-to-day governance and management. (See 'Sharpening the role of the member' below)

The evolving role of trustees and chairs

Scale changes what effective trusteeship looks like. In smaller trusts, trustees may be able to rely heavily on personal knowledge of individual schools, leaders, and local circumstances. As trusts grow, this becomes neither realistic nor desirable.

The focus moves away from operational familiarity and towards stewardship of the system as a whole. Effective trustees learn to ask different questions: not "Have we seen everything?" but "How do we know the right things will be surfaced?"

One of the challenges of governing at scale is resisting the tendency to substitute scrutiny for stewardship and reassurance for assurance. Requests for ever-more detailed reports and board involvement in operational decisions can create bottlenecks and weaken accountability. Effective trustees remain curious and challenging while recognising that confidence comes from the quality of assurance systems rather than proximity to every decision.

For chairs, scale often requires a particular emphasis on relationship-building. The chair becomes a key interpreter between trustees, executives, members, and stakeholders, helping maintain trust, constructive challenge, and strategic coherence across a larger and more complex organisation.

The personal demands of chairing a large and complex trust should not be underestimated. The responsibility for overseeing substantial public investment, managing difficult decisions, and leading the board can be both demanding and, at times, lonely. Trusts should therefore invest deliberately in the support infrastructure around chairs, including governance professionals as trusted strategic partners, access to mentoring and development, and opportunities to learn alongside peers. These forms of support are not merely beneficial, they are vital in helping chairs remain effective, resilient stewards of the organisation.

The evolving role of the executive

Many CEOs and senior executives come from successful headship backgrounds, where effectiveness often depends on close involvement in operational detail, direct oversight of activity, and personal visibility across



the organisation. These approaches can work well within a single school. At scale, however, they become increasingly difficult to sustain. As organisational complexity grows, executive leaders cannot rely on personal knowledge, individual approval, or direct involvement in every significant decision.

Executive leadership at scale requires a shift from control to stewardship, becoming increasingly comfortable distributed authority. Sustainable scale depends on creating the conditions for others to succeed: building strong teams, investing in leadership capacity, and trusting people to exercise judgement within clear frameworks and expectations.

Executives must resist becoming organisational bottlenecks through unnecessary approvals, excessive reporting requirements, or concentration of decision-making authority. This can slow decision making, weaken accountability, and limit innovation. Instead, they need confidence that decisions can be made by those closest to the relevant expertise and context, supported by robust systems, healthy culture, and clear accountability. At scale, executive success is measured not by how much an individual controls, but by how well the organisation can operate, learn, and improve without relying on their direct intervention.

Relationships with boards must also evolve. In a single school, governors may receive detailed operational reports that provide a rich overview of activity. At scale, the equivalent 'headteacher report' quickly becomes impractical. Backward-looking lengthy narrative updates, detailed descriptions of completed activity, and extensive reporting can obscure rather than illuminate the issues that matter most.

Executives therefore play an important role in helping boards govern by providing strategic, focused, and proportionate assurance. Reporting should prioritise key risks, trends, exceptions, and emerging issues, drawing together insight from across the organisation rather than presenting a retrospective account of activity. This is particularly important in the context of voluntary governance. Trustees contribute their time and expertise freely, and their attention is a finite and valuable resource. Effective executive reporting respects that contribution by focusing on the information required for stewardship, challenge, and decision making. (See 'Refined board reporting' below)

Finally, executive leadership at scale involves recognising governance as a strategic organisational function, led by a governance professional positioned as a strategic leader, and requiring sufficient investment. Governance can no longer be treated as an administrative function carried by a single governance professional operating at the margins of the organisation. Trusts routinely invest in growing their finance, HR, educational, and operational functions as complexity increases; governance requires the same consideration. Under-investment in governance creates operational risk, weakens assurance, and places unsustainable pressure on individuals carrying responsibility for increasingly complex governance systems. (See 'The evolution of governance teams' below)

The governance professional

As CST's [Next-gen governance](#) paper underscores, governance professionals are not merely custodians of compliance, but architects of strategic oversight and champions of sustainable, values-driven, ethical practice. As trusts scale, there is inevitably a need to align structures with strategy, streamline reporting systems, rationalise policy management, and transition from local operational oversight to strategic assurance – to do all of this, the governance function in a trust requires sufficient capacity and capability to operate effectively.

What does the governance professional need to lead at scale?	
Capacity and capability	Governance teams require appropriate resourcing to manage operational matters effectively, and dedicated time to focus on strategic development meaningfully.
Technical skills and up-to-date knowledge	To ensure that processes remain compliant in a fast-evolving complex landscape, the governance professional needs to be able to access ongoing development, support, and sector briefings.
Insight and early involvement	Positioned as integral to a trust's growth and change processes, the governance function should be closely involved in due diligence and onboarding; the detailed work required through mergers and expansions; transitional governance arrangements; and embedding organisational values and cultural norms.

Networks and professional development

Governance capacity extends beyond adequate staffing and includes access to robust systems, tools, networks, and ongoing dedicated professional development. Without this infrastructure and wraparound support, the governance professional will struggle to fulfil the increasing demands of a complex role.

Balancing compliance and innovation

Governance professionals ensure boards meet statutory requirements whilst being able to innovate and adapt to the evolving educational landscape. It is a delicate balance of maintaining rigorous standards while also encouraging creativity and flexibility amongst volunteers. A dedicated, protected governance budget is essential to ensuring that these teams are properly resourced and taken seriously across the organisation, but this commitment to governance is not yet consistent across the sector.

Positioning and perception

Language and positioning matter: how governance is regarded across the trust will ultimately be a determining factor in how impactful the governance professional can be in their role at scale. We know that institutional or historic attitudes towards governance are reflected in their remuneration: TGP survey data shows that trust scale, seniority of job title, level of expertise or extent of remit are not always reliable indicators of governance professional pay. Instead, this is more strongly influenced by how governance is positioned internally (administrative vs managerial vs strategic leadership).¹⁷

A strategic leadership role

At its best, the governance professional role is not administrative or purely advisory but evolves into one of strategic leadership, organisational design, change and stakeholder management. Effective scaling depends on clear communication, genuine consultation, and co-creation with stakeholders, all of which governance professionals help facilitate. They become a key conduit between the board, executive, and wider trust communities, ensuring clarity, alignment and good decision making. In practice, this means trusts should be positioning the lead governance professional within or alongside the executive leadership team whilst remaining clear about accountability: the governance professional ultimately works for the board and is often regarded as the 'conscience' of the organisation. As such, they must retain objectivity even where the role is closely aligned with executive

¹⁷ TGP survey of Trust Governance Insight participants (192 respondents across trusts of all sizes), 2025-26

activity.

Governance at the heart of scale

Scale projects are governance projects. They are concerned with risk management, gathering assurances, making informed decisions, and establishing clear, meaningful stakeholder engagement mechanisms. If positioned correctly and empowered to lead strategically, the governance professional can ensure that governance structures remain robust and responsive as organisational complexity increases.

AI cannot be your governance professional

Whilst trusts may be tempted to use AI to support governance activities such as minute-taking, policy reviews, agenda planning, and the preparation of reports, these administrative efficiencies should not be confused with the exercise of governance itself. Good governance depends on understanding context, recognising nuance, facilitating constructive challenge, maintaining relationships, and exercising judgement about what matters most.

Governance professionals can help boards distinguish between information and insight, ensuring that the quality of judgement remains high even as the quantity of information expands. As technology becomes more capable, governance professionals become more important, not less, in helping boards navigate complexity, interpret assurance, and make informed decisions in the best interests of children and young people.

The triumvirate

Governance at scale depends on the quality of the relationship between the board, the executive, and the governance professional. None of these roles can succeed in isolation. The board provides stewardship, strategic direction, and accountability. The executive provides leadership, implementation, and organisational intelligence. The governance professional designs and maintains the conditions that allow good governance to operate. All three need to be 'in the room' when key decisions about governance are made.

Yet survey data tells us that executive access for the governance professional does not currently increase with scale and complexity – conversely, the proportion of governance professionals on the executive team or being jointly line managed by the chair and chief executive falls considerably as trusts grow.¹⁸ This needs careful consideration. As trusts scale, the relationship between these three functions often becomes more important than any individual governance structure. Governance failures are frequently caused not by ineffective committees or schemes of delegation, but by misunderstanding of roles, unclear expectations, or weaknesses in the flow of information and challenge between the board, executive, and governance function. When these roles are clear and mutually trusting and respectful, governance can remain coherent despite increasing complexity and distance.

Governance professionals may be employed by the trust, but they serve the board and must retain sufficient independence to provide objective advice, enable effective challenge, and support robust decision-making. This

¹⁸ In a TGP survey of 192 trust governance professionals in 2025-26, nearly half in trusts with 6-10 schools were on the executive team, reducing to 18% in trusts with over 30 schools. Just 7% of governance professionals in trusts with over 30 schools were jointly line managed (in comparison to nearly a third in the smallest trusts).



is best achieved through a hybrid performance management arrangement: accountability rests with the board through the chair, while day-to-day line management, employment processes, and operational support are provided by the executive. This helps to preserve the governance professional's independence whilst recognising that chairs cannot reasonably be expected to undertake all aspects of employment management.

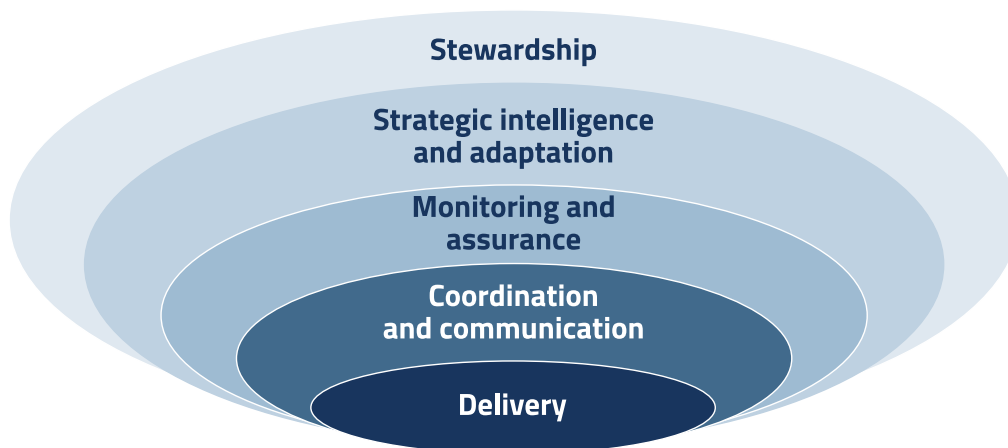
Designing governance as a viable system

Governing at scale requires an approach that can cope with complexity, pace, and interdependence. Systems thinking provides a helpful way of doing this. Rather than treating governance as a collection of meetings, roles, or structures, it frames governance as a set of interlocking systems, each with a distinct function, working together to keep the organisation viable over time.

We have adopted a well-established model that identifies five such systems.¹⁹ This five-system model applies to organisations of any size. However, as organisations grow, their viability increasingly depends on all five systems being intentionally designed, clearly differentiated, and coherently work together.

For our purposes, we call these systems:

1. Delivery
2. Coordination and communication
3. Monitoring and assurance
4. Strategic intelligence and adaptation
5. Stewardship



The value of the model lies not in its terminology, but in the discipline and mindset it brings. This model helps boards distinguish clearly between:

- what needs to happen day to day
- how activity is aligned and assured
- how the organisation adapts to future demands
- where questions of purpose, identity, and long-term balance properly sit.

Governance failures at scale typically arise not because a single function is absent, but because systems are confused, overloaded, or neglected. When coordination becomes control, when short-term operational pressures crowd out strategic intelligence, or when the board is drawn into operational detail, the system becomes brittle rather than resilient.

System one: Delivery

System one comprises the parts of the organisation that do the core work and interact directly with the external environment. In a trust, this includes schools and shared operational functions, but it also includes the various 'units' in the governance structure such as committees or working groups.

¹⁹ Beer, S (1985). *Diagnosing the System for Organizations*. John Wiley & Sons. The governance model set out in this section draws on Stafford Beer's Viable System Model, a systems-thinking framework for understanding how organisations remain viable in complex and changing environments.

At scale, effective governance preserves subsidiarity, allowing sufficient authority to respond to context, while operating within trust-wide expectations. Governance adds value here by ensuring clarity of roles, capability, and support.

System two: Coordination and communication

System two exists to prevent fragmentation, duplication, and conflict between delivery units. As scale increases, informal alignment is no longer sufficient. Without coordination and communication, people pull in different directions and capacity is wasted.

In governance practice, this includes schemes of delegation, terms of reference, shared policies and frameworks, and common language reinforced through induction and training. It also includes coordinated governance rhythms, annual agenda cycles, and well-timed rapid information flows between layers, underpinned by psychological safety.

To illustrate, well-designed agenda templates across the local tier can strike a balance between consistency and context: ensuring that core trust-wide issues are considered everywhere, while preserving space for local committees to surface contextual matters that require attention. Structured opportunities for collaboration, communication, and stakeholder voice also sit here, such as chairs forums, safeguarding or SEND champion networks, parent forums, and pupil parliaments.

System three: Monitoring and assurance

System three focuses on ensuring the organisation is functioning as a coherent whole by setting operating constraints, monitoring performance, and allocating resources as needed.²⁰ Importantly, system three does not do the work itself.

Monitoring has impact when it is:

- intermittent (rather than regular or announced)
- in-depth (rather than superficial)
- qualitative (rather than quantitative)
- observational and developmental (rather than directive and high stakes)
- looking for mismatches (rather than confirming existing assumptions)

In trusts at scale, this includes executive oversight, board and committee assurance arrangements, immediate (rather than emerging) risk governance, and proportionate use of internal and external audit. An effective system three enables boards to be confident that the organisation is operating within agreed parameters and with the right resources, without defaulting to micromanagement.

System four: Strategic intelligence and adaptation

System four looks outward and forward. It scans the external environment, anticipates future risks and opportunities, and supports continuous learning, innovation, and adaptation. This includes long-term planning, horizon scanning, succession planning, and preparation for inflection points such as growth or system redesign.

At scale, governance failures often arise because this system is under resourced or crowded out by short-term operational pressure. Structured opportunities for innovation (the 'disruptive edge'²¹), supported by psychological safety and a willingness to learn, are a critical part of keeping the organisation viable over time.

²⁰ Hoverstadt, P (2026). *The Fractal Organisation Manual*. SCiO Publications.

²¹ Hill, A (2023). *Centennials: The 12 Habits of Great, Enduring Organisations*. Cornerstone Press.

System five: Stewardship

System five sets the organisation's identity, values, and ultimate authority: the 'stable core'. It arbitrates between present demands and future needs, holding the tension between stability and change. This is where questions of purpose, values, and long-term direction properly sit.

In a trust context, this function is served by the board of trustees and members. They exercise strategic stewardship, seeking assurance rather than reassurance, asking the right questions, and holding the organisation together across time. At scale, this function becomes more important, not less.

We have set out a useful board self-assessment tool in [Next-gen board leadership framework](#).

Archetypes of system weakness

Below are a few 'archetypes' of system weakness drawn from Patrick Hoverstadt's work:²²

Archetype	Design solution
Labyrinth (System one delivery weakness) – When the flow of work crosses multiple organisational boundaries, creating delays and friction.	Designing governance around value-creating flows rather than organisational units (e.g. coordinating safeguarding assurance end-to-end across DSL networks, trust leads, local and board committees, and the board, with clear ownership at each stage).
Reinventing the wheel (System two coordination and communication weakness) – organisation repeatedly addressing the same problem and duplicating effort ('fluffload'), through lack of coordination	Eliminating duplication through explicit coordination and sequencing (agreeing where expertise sits, the order of scrutiny and assurance, and how insights move between the education team, local committees, board committees, and the board).
Control dilemma (System three monitoring and assurance weakness) – Heightened complexity drives increased demands for performance reporting by managers due to fear of loss of control, leading to more 'fluffload' for staff	Refocusing assurance on quality of insight rather than reporting volume (tightening the purpose, cadence, and impact of data drops and monitoring activities, and eliminating reporting mechanisms that add workload without improving insight).
Here be dragons (System four strategic intelligence and adaptation weakness) – systemic failure to learn about emerging risks in the environment and integrate intelligence into strategic decision making	Structurally integrating strategic intelligence into governance decision making (treating risk, horizon scanning, and external insight as live inputs across executive and board deliberation, rather than siloed items within audit and risk processes).
Follow the leader (System five stewardship weakness) – allowing exec leaders to introduce a continuous stream of initiatives, with rapid and unrelated changes of direction sapping organisational resources without achieving lasting improvements	Reasserting board stewardship of purpose and direction (testing initiatives against long-term strategy, resisting serial change, and setting clear limits on organisational priorities)

In practice, the same roles, teams, or structures may contribute to more than one

²² Hoverstadt, P (2026). *The Fractal Organisation Manual*. SCiO Publications.

of the five systems, and responsibility for particular functions may be distributed rather than neatly contained.²³ What matters is not that each system maps cleanly onto a single committee, role, or layer, but that the essential functions of coordination, control, intelligence, and policy are clearly present and effectively connected.

The model is therefore best understood as a way of making governance functions visible and explicit, rather than as a hard organisational template, allowing trusts to recognise overlap, adapt to context, and design arrangements that reflect how their organisation actually works while maintaining overall viability.

²³ See Appendix 1 for exemplifications of how the five systems might work in practice in key areas.



From theory to practice

Set out below are practical examples of how trusts have realised the 'scale dividend' while also grappling with the risks and challenges of scale, tying each example to the five systems model.

The evolution of governance teams

System 1: Delivery, System 3: Monitoring and assurance

The appropriate level of governance capacity will vary between trusts. Survey data tells us that although larger trusts tend to have bigger governance teams, this is not always the case – nor does governance staffing increase proportionately with school numbers. Indeed, the number of governance professionals per ten schools reduces as trusts grow.²⁴ Ultimately, the key question is not whether a trust has a particular structure or team size, but whether governance capacity is keeping pace with organisational complexity. Boards should review this periodically as part of their wider consideration of organisational growth and sustainability.

Growing trusts that resource governance well have mitigated the risk of 'single points of failure' by establishing layered teams: typically a director-level lead or equivalent with additional support to handle the expanded strategic and operational workload that comes at scale. The sector has seen the development of regional governance officers overseeing hubs or clusters of schools, or local governance professionals providing school-level support. Larger teams enable specialisation in specific functions, and the strategic capacity of the governance professional increases: the same survey indicates that as teams grow, so does the ability for the governance professional to take on the delivery of training, away days, and assurance work.

At each layer, trusts are clearly setting out the oversight role of each governance professional and the remit they have in relation to the trust, its schools, and communities. Some trusts have also developed bespoke governance professional roles to meet specific strategic priorities, including stakeholder engagement, governance recruitment, and complaints management. It is recommended that the board considers adding succession planning of the lead governance professional to the risk register and keep this under review, in recognition of the critical nature of this role and the institutional knowledge they carry.

Refocusing the role of the local committee

System 1: Delivery, System 2: Coordination and communication, System 3: Monitoring and assurance

As trusts grow, many have been 'reimagining' the purpose and remit of the local committee. In smaller trusts, significant delegated responsibility for policy approval, monitoring, and assurance often sits at the local level. At scale, however, this can create duplication, confusion about decision-making authority, and blurred lines of accountability between the board, the executive, and local governance. Trusts also report that overly broad local remits can add unnecessary duplication and "fluffload" for headteachers, without improving assurance.

There is, however, no single model of effective local governance at scale. Trusts operate in different contexts and face different governance challenges. While many trusts have chosen to refocus local governance on stakeholder voice, community insight, and contextual intelligence, others continue to delegate meaningful

²⁴ TGP survey of Trust Governance Insight participants (192 respondents across trusts of all sizes), 2025-26.

responsibilities for challenge, assurance, and scrutiny. What matters is not the precise distribution of responsibilities, but that the role of the local committee is intentionally designed, clearly understood, and aligned with the trust's wider governance framework.

Many trusts describe local governance adding greatest value where it is rooted in local insight, knowledge, and relationships, with a sharp focus on understanding the school context, engaging with parents and communities, and acting as a conduit for local intelligence to the trust board. By clarifying this remit, trusts have seen stronger engagement from local governors, more purposeful meetings, and headteachers report that local governance adds greater value.

In some trusts, this shift is complemented by the introduction of a regional assurance layer, strengthening educational scrutiny and coherence across groups of schools, while enabling local committees to focus more explicitly on community voice and contextual insight.

For more examples of redesigned governance models, CST members can watch a [recording of our March 2026 Governance community meeting](#) on our professional community platform.

Managing panel workload through resolutions teams

System 1: Delivery and System 2: Coordination and communication

The challenge for governance at scale is to maintain high-quality oversight of suspensions, exclusions, complaints, and HR matters without over-relying on a small pool of increasingly time-poor individuals. Assembling and managing panels can be an intense and time-consuming task for governance professionals, creating a real risk of missing statutory timeframes.

To address this, trusts are establishing resolution teams. This model brings together internal and external volunteers, all of whom are specifically trained in panel work, allowing trusts to sub-delegate panel functions through local or other board committees while maintaining legal compliance with their articles of association. To maximise flexibility and avoid strict legal requirements for trustee majorities, it is recommended to categorise this volunteer group as a 'pool' or 'team' or another 'local committee' rather than a formal board committee.

Scale can also increase variability in the quality of panel practice, particularly in exclusions. Trusts address this variability through consistent training for all headteachers and resolution team members, as well as clear guidance, template suspension and exclusion letters, and decision-making checklists for both headteachers and panels.

To manage the logistical burden across geographically dispersed trusts, governance professionals pre-schedule panel dates throughout the year and ask resolution team members to block out availability in advance. This reduces pressure on tight timescales and ensures that critical governance work is shared across a trained, available group operating to a clear code of conduct and mandatory training requirements.

The benefit of this approach is not merely administrative efficiency. By creating a larger pool of trained and experienced panel members, trusts can improve the quality, consistency, and perceived independence of panel processes. Scale makes it easier to match panel members to cases appropriately, reduce conflicts of interest, and ensure that experience is retained and developed over time. This can strengthen stakeholder confidence that decisions are reached fairly, are appropriately challenged, and are not overly influenced by local relationships or individual

perspectives. In this way, the trust's scale becomes a governance asset rather than simply a governance challenge.

'Circles' for agile, informed decision making at scale

System 1: Delivery and System 4: Strategic intelligence and adaptation

To counteract the ossification of decision making at scale and facilitate cross-team delivery, one trust has developed the concept of 'Circles' as a practical operating model for distributed leadership and decision making. Circles are small, focused groups that bring together the colleagues with the greatest expertise to do a specific piece of work. The principle is simple: the right people, doing the right work, at the right time. Decisions are therefore made by those closest to the issue, rather than travelling up and down a hierarchy for approval, which in turn increases pace, clarity, and ownership.

In practice, Circles function as dynamic, purpose-driven System 1-type units rather than fixed teams. They are designed to mobilise around different types of work, including strategic priorities, day-to-day operations, and focused improvement activity. They rely on high levels of transparency, with information shared openly so that participants have the context they need to act with confidence, without unnecessary gatekeeping.

There are three types of circles:

- Standing circles: focused on ongoing operational delivery (System 1 - Delivery)
- Transformation circles: designed to drive rapid improvement and innovation (System 4 - Strategic intelligence & adaptation)
- Big move circles: focused on adapting key strategic organisational priorities (Systems 4 and 5 - Strategic intelligence & adaptation and Stewardship)

This shift also reframes leadership within a trust: authority is not tied to position, but to expertise and contribution, and trustees and exec leaders act less as 'decision-makers' and more as stewards of the system, enabling others to take informed decisions.

Importantly, Circles are not formal board committees and, like the resolutions teams described above, are not constrained by the articles of association in their membership.

Policy management

System 2: Coordination and communication

As trusts grow, maintaining multiple versions of the same policy across schools becomes increasingly inefficient and risky. Trusts operating at scale report clear benefits from moving key policies to a single, trust-wide position, with scope for defined local arrangements where genuinely necessary to address contextual needs. This approach supports consistency of practice, clarity of expectation, and fairness for staff, pupils, and families, regardless of school.

Adopting trust-wide policies also strengthens governance and compliance by simplifying oversight and assurance. It removes the need to review and update multiple, often diverging versions of the same policy, reducing the risk of gaps, outdated content, or unintended inconsistency. Local flexibility is then focused where it adds value, rather than being absorbed by unnecessary duplication.

Standardising governance cycles, agendas, and records

System 2: Coordination and communication

Trusts operating at scale report the value of standardising core governance processes across all schools, including agenda templates, minutes templates, agenda cycles, and meeting schedules. A shared approach supports consistency, comparability, and clarity, while reducing unnecessary variation and administrative effort.

Introducing specific standardised items on agendas across all schools can be designed to reflect the assurance framework of the trust, ensuring that key risks, priorities, and statutory responsibilities are covered routinely, while still allowing adequate space on the agendas for local context, challenge, and insight. Common templates for minutes or action logs similarly support clarity of record-keeping and strengthen assurance.

Coordinating meeting cycles across the trust also matters. Aligning local and trust-level meeting schedules helps ensure that local insight, concerns, and intelligence reach the board at the right time to inform decision making. Together, these shared structures support organisational grip, reduce duplication, and enable governance professionals and volunteers to focus on substance rather than process.

Technology as a governance enabler

System 2: Coordination and communication and System 4: Strategic intelligence and adaptation

Trusts report using technology to strengthen governance through faster feedback loops, clearer information flows, and improved board oversight. At the local level, online forms are being used to capture immediate post-meeting feedback, which then auto-populate shared dashboards visible to governance professionals and senior leaders. This enables timely visibility of issues, emerging intelligence, and areas requiring support or escalation.

Some trusts are also moving away from traditional minutes for advisory or non-decision-making committees, replacing them with live action logs that capture support, challenge, and agreed actions in real time. This sharpens accountability, reduces administrative burden, and aligns record-keeping more closely with the purpose of the meeting.

Similarly, key information about complaints is increasingly captured through standardised online forms that feed directly into dashboards. This allows boards to see trends, patterns, and recurring issues across the trust, strengthening learning, assurance, and improvement. Website compliance is also being streamlined through the central management of statutory policy pages across all schools, often using AI-assisted tools, improving consistency, accuracy, and oversight at scale.

Trusts also emphasise the importance of holding all governance documents on a single, shared platform. Many use paid governance platforms to accommodate access by external and non-employee participants, such as trustees and local governors. Others successfully use internal platforms, provided these are configured with appropriate access controls. In both cases, a single source of truth improves version control, transparency, and confidence that all participants are working from the same, current information.

Using AI to enable more strategic governance

System 2: Coordination and communication and System 4: Strategic intelligence and adaptation

Governance teams are leveraging AI to support meetings, deploying approved transcription tools to draft minutes, review website compliance, or synthesise key strategic themes from reports for the trust board. This has shifted capacity away from manual note-taking to high-level strategic oversight. While some clerking functions may be outsourced, it is essential that strategic in-house governance capacity is not diminished. AI tools, for example, are there to support workload rather than replace trusted expertise, and must be used with consideration for the sensitive information involved.

This shift has allowed governance professionals to take on a more strategic role. With less time spent on manual administration, they are increasingly focused on assurance, evidence, and the quality of decision making. This requires the confidence to challenge senior leaders on transparency and the adequacy of information presented to the board. These can be difficult conversations, but when framed in terms of organisational stewardship, they help reposition governance as a core part of effective leadership rather than a procedural hurdle. As one governance professional reflected: "If I think about where I was then and where I am now in terms of my confidence and ability, I'm in a different place."

Refined board reporting

System 3: Monitoring and assurance

As trusts scale, boards can become overwhelmed by lengthy and detailed reporting. Replicating the 'headteacher report' at scale no longer serves. These trusts have moved to short, sharp and highly focused reporting that provides aggregated insight rather than school-specific detail, adhering to the principle of reporting by exception. For more details about effective board reporting practice and a case study of one trust's practice, see CST's [Effective board reporting](#) paper. The DfE has linked the paper into its [Effective governance resources](#) webpage.

Standardising data systems to obtain local assurances

System 3: Monitoring and assurance

In the shift to scale, trusts recognise the necessity to standardise systems and approaches to data across settings, asserting that failing to do so would leave the executive unable to track or evidence progress or trends across the trust. This structural evolution has included replacing traditional, lengthy reports with data-driven dashboards and professional 'roundtable' summaries, shifting a board's focus from anecdotal reassurance to systemic strategic assurance. It bears repeating, however, that every piece of data collection has a cost and trusts must be intentional about what they are collecting and why. (See 'Over-reliance on KPIs, metrics, and data (and AI)' above).

In one trust a regional assurance board was intentionally added to the formal governance structure to ensure the quality of local level engagement, enabled through the tracking of key indicators and overseen by trustees to ensure direct communication between local committees and board.

To maintain governance quality across dozens of settings, another governance team has implemented a development framework to RAG-rate compliance, attendance, meeting papers, and evidence of scrutiny at local committee level. This framework is

tracked every term (completed by the governance professionals working locally) and used by the board to obtain evidence of effectiveness and a 'culture of confidence' across the trust as it scales.

Sharpening the role of the member

System 5: Stewardship

Steady stewardship at scale depends on sharpening the role of members as guardians of purpose. Members must have sufficient visibility of the trust without becoming drawn into operational detail.

In practice, governance professionals are finding that a disciplined rhythm of engagement supports this balance: for example, regular updates to members, such as a termly newsletter highlighting key developments, alongside at least two formal meetings each year, including a mid-year meeting to provide sight of the interim financial position. Regular informal check-ins with the chair of trustees can further support alignment and understanding. Together, these approaches help members to retain an 'eyes on, hands off' role, even as the organisation grows in size and complexity.

To discharge their responsibilities well, members may need more structured mechanisms to gain assurance about the work of the board, such as commissioning external reviews of governance, receiving and considering the resulting findings, and drawing on the Academy Trust Governance Code. These mechanisms can also help members identify the areas on which their scrutiny and questioning should be focused, enabling them to fulfil their role without straying into governance or operational matters.

Conclusion

Trusts have spent the past two decades developing increasingly robust governance arrangements, building deep expertise, confidence, and shared norms of practice across the sector. As trusts grow in scale, complexity, and system responsibility, our challenge (and opportunity) now is to build on that solid foundation by designing governance arrangements that are confident, proportionate, and fit for scale.

This means governance that enables effective stewardship of complex systems, strengthens meaningful assurance, retains accountability, and is deliberately shaped to mitigate the risks that scale can bring. In doing so, trusts can move beyond narrow compliance towards governance that is resilient, intelligent, and focused on long-term public value. This shift is consistent with the Academy Trust Governance Code's emphasis on purposeful leadership, strong culture, and assurance that supports good decision making, rather than compliance for its own sake.

CST, TGP, and our professional communities will continue to support this shift, working with trusts to shape governance that is fit for today's context, while remaining focused on the educational outcomes that matter most for children and young people.



Appendix 1: Five systems model in practice

The functions of a viable system rarely map neatly onto organisational charts, teams, or committees. Good governance design is therefore organised around activities, decision rights, and outcomes, rather than inherited structures.

The worked examples in this appendix illustrate how different trust activities can be mapped across the five systems of the Viable System Model. They are intended to show that many core trust activities are inherently cross-functional, involving multiple roles, teams, and governance layers working together. For example, safeguarding (the first example below) does not sit neatly within a single function, but spans across areas like HR, IT, estates, curriculum, health and safety, as well as external partners, reflected in the range of policies, strategies, data, and leadership roles involved.

The examples also demonstrate that activities such as safeguarding, estates, staffing and recruitment, and governance practice can each be designed as coherent assurance frameworks in their own right. When structured well, they allow boards to gain confidence that the activity is being effectively coordinated, monitored, and adapted over time, without fragmenting oversight or relying on duplication across committees or reports. The purpose of these examples is not to prescribe organisational structures, but to illustrate how clarity of design can support proportionate, intelligible board assurance at scale.

Activity: Safeguarding and child protection

System 1: Delivery	System 2: Coordination and communication	System 3: Monitoring and assurance	System 4: Strategic intelligence and adaptation	System 5: Stewardship
Everyone Led by: Exec team lead Trust DSL Headteachers School DSLs and deputy DSLs H&S managers Estates managers HR recruitment External agencies and local partners	Regular board messaging to all stakeholders Safeguarding, H&S, estates, people strategies Safeguarding, H&S, estates, people policies Live & embedded risk register widely shared Well-communicated scheme of delegation Terms of reference for committees and networks Well-sequenced agenda cycles and information flows Consistent report templates, allowing context Consistent training and induction Consistent data and incident reporting trust-wide School audit actions shared across stakeholders Trust DSL-convened DSL network Safeguarding trustee and local champion network Curricular embedding of safeguarding culture	Exec team lead and trust DSL: scrutiny and monitoring Expert peer reviews and audits with consistent formats (internal and external) Board/committees: trust, regional and local level reporting and scrutiny Staff, parent, and pupil forums and surveys	Exec team lead and trust DSL horizon scanning Board committees: trust, regional, and local level horizon scanning Trust DSL network: driving innovation	Board of trustees: overall accountability and foster strong trust-wide culture of safeguarding and psychological safety Members: informed and hold trustees to account
Red handles: Critical incident response, whistleblowing processes				

Activity: Staffing and recruitment

System 1: Delivery	System 2: Coordination and communication	System 3: Monitoring and assurance	System 4: Strategic intelligence and adaptation	System 5: Stewardship
Joined-up decision making, avoiding delays: Exec team lead Headteachers Head of HR HR team Finance team Education team Marketing team	Regular board messaging to all stakeholders People strategy HR policies Live & embedded risk register widely shared Well-communicated scheme of delegation Terms of reference for committees and networks Well-sequenced agenda cycles and information flows Consistent recruitment (including safer) training Consistent data collected trust-wide Consistent induction processes	Exec team lead and head of HR: scrutiny and monitoring Board/committees: trust, regional, and local level reporting and scrutiny of data	Exec team lead and head of HR: horizon scanning Board and committees: trust, regional, and local level horizon scanning	Board of trustees: overall accountability and fosters healthy organisational culture Members: informed and hold trustees to account
Red handles: Whistleblowing processes				

Activity: Governance practice

System 1: Delivery	System 2: Coordination and communication	System 3: Monitoring and assurance	System 4: Strategic intelligence and adaptation	System 5: Stewardship
Board of trustees Governance professional and team Exec team Committees and working groups Staff, parent, pupil and community forums	Regular board messaging to all stakeholders 'Governance arrangements' document Board assurance framework on key areas Live and embedded risk register widely shared Well-communicated scheme of delegation Terms of reference for committees and networks Well-sequenced agenda cycles and information flows Consistent report templates, allowing context Consistent training and induction for new recruits Chairs' forum Governance conference	Governance professional and team: review Annual board, committee, & chair self-assessment processes External review of governance (every three years)	Governance professional and team: horizon scanning Board and committees: trust, regional, and local level horizon scanning	Members : informed and hold trustees to account Board of trustees: overall accountability and foster strategic and long-term outlook
Red handles: Conditional stakeholder-activated escalation pathways				

Activity: Estates

System 1: Delivery	System 2: Coordination and communication	System 3: Monitoring and assurance	System 4: Strategic intelligence and adaptation	System 5: Stewardship
Exec team lead Estates manager H&S manager Site managers Trust DSL Finance team Education and inclusion team	Regular board messaging to all stakeholders Estates, H&S, education, and inclusion strategies Estates, H&S, finance, procurement policies Live asset management plan Live and embedded risk register widely shared Well-communicated scheme of delegation Terms of reference for committees and networks Well-sequenced agenda cycles and information flows Consistent training and induction Consistent data and incident reporting trust-wide Condition audit actions shared across stakeholders Site manager network	Exec team lead and estates manager: scrutiny and monitoring Expert condition audits with consistent formats (internal and external) Board/committees: trust, regional and local level reporting and scrutiny Staff, parent, and pupil forums and surveys	Exec team lead and estates manager: horizon scanning Board committees: trust, regional, and local level horizon scanning Trust site manager network: driving innovation	Exec team lead and estates manager: horizon scanning Board committees: trust, regional, and local level horizon scanning
Red handles: Direct and unmediated pathways for critical incidents				





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