

From core to strategic

Maximising the impact of technical, professional, and operational services

Chris Kirk and Sophie Hill

in association with

CJK
EDUCATION STRATEGY DELIVERED

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Confederation
of School Trusts

The voice of school trusts

About CJK Associates

CJK was founded when Chris Kirk recognised the need for a consultancy for the education sector which could combine 'blue chip' strategy and operational consulting with detailed management expertise, to deliver powerful insight and practical change. Chris is a former civil service fast streamer who built his skills through 14 years at PwC, where he was a partner in the Strategy Consulting business. Chris then spent four years as CEO in an international school group with over 50 schools, putting consulting theory into practice. The learnings from this experience form the basis for a set of solutions which have been honed through seven years of working with school groups, suppliers and investors in the UK and internationally.

Confederation of School Trusts

The Confederation of School Trusts is the national organisation and sector body for academy trusts. Our members educate more than four million children through the dedicated work of their 600,000 staff.

We believe school trusts offer the best model for improving education because they uniquely unite schools in organisations with a strong, single purpose: education. This encourages the sharing of expertise, ideas, and resources to give pupils a better start in life.

We advocate for trusts by helping politicians, policy makers, and the wider public better understand their power to help children. We support trusts through practical advice, strategic guidance, and consultancy. We connect them with each other, and with expert thinking and research.

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Executive summary

From shared services toward integrated trust-wide capability

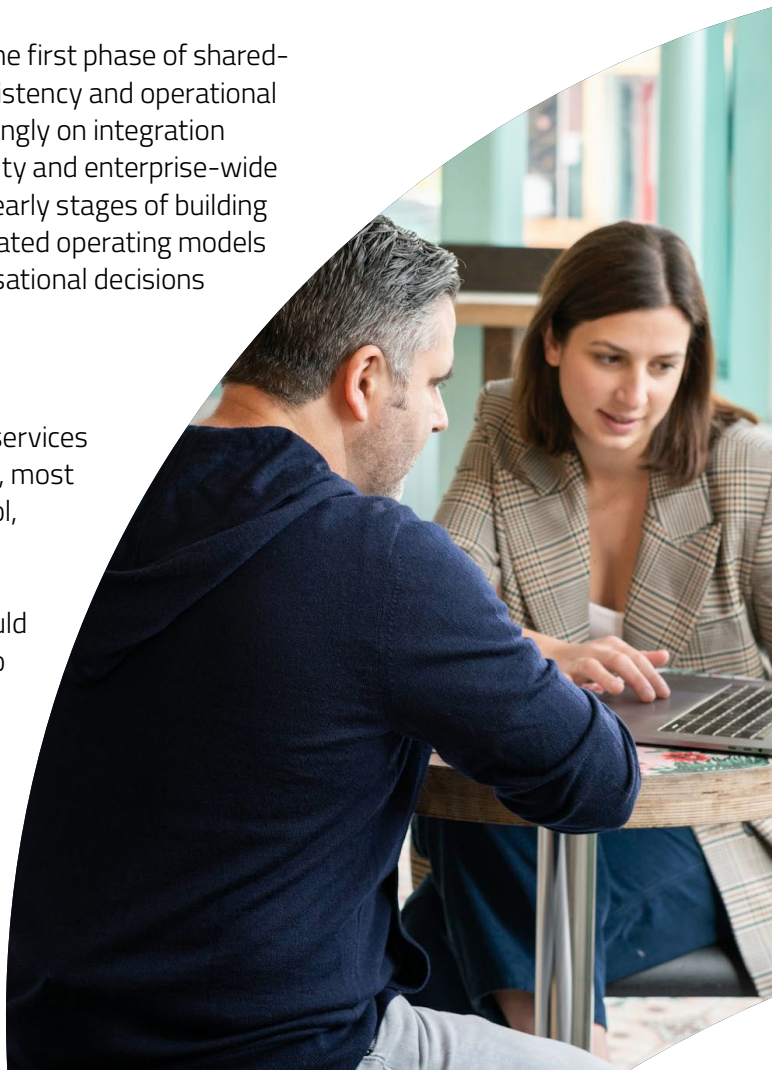
School trust operations provide the essential platform for education to flourish. Our research finds that most trusts now have strong core operational capability covering areas such as financial control, employee relations, estates compliance and cyber resilience.

However, the picture becomes more uneven beyond core compliance and operational delivery:

- Finance is generally the most systematised and consistently centralised function
- IT also shows comparatively strong maturity in infrastructure, platforms and cyber resilience.
- HR appears operationally strong but less industrialised in areas such as workforce planning, leadership development and systems integration.
- Estates remains the most operationally fragmented function, with strong compliance oversight but more variable maturity in workflow coordination, utilisation planning and service management.

The research also highlights a consistent drop-off in strategic capability across all four functions, including advanced analytics, integrated planning, data interoperability, automation and strategic organisational insight. This pattern appears consistently across all functions: finance remains relatively weak in advanced insight and modelling; HR is data-rich but comparatively weak in workforce analytics and succession planning; estates increasingly holds asset and compliance data but often lacks strategic utilisation insight; and IT frequently remains focused on infrastructure management rather than broader digital enablement and enterprise architecture.

The findings suggest that trusts are now moving beyond the first phase of shared-services maturity, which focused primarily on control, consistency and operational resilience. The next phase appears likely to depend increasingly on integration between functions, strategic use of data, specialist capability and enterprise-wide organisational planning. While some trusts are still on the early stages of building stable services, for many the challenge is to develop integrated operating models capable of turning operational capability into better organisational decisions and outcomes.



The maturity challenge

The findings from this research suggest that trust shared services are entering a new phase of maturity. Over the last decade, most trusts have focused first on establishing operational control, compliance, and consistency as they grew from individual schools into more complex organisations. However, many trusts are moving beyond the initial question of "what should be shared?" toward a more sophisticated challenge: how to operate effectively as a coherent enterprise at scale.

Importantly, the maturity pathways across finance, HR, estates and IT are not identical. Finance matured fastest in areas linked to regulatory accountability, financial control and statutory compliance. HR maturity has been driven more strongly by organisational leadership,

employer responsibility and workforce management. Estates maturity reflects the increasing need for portfolio risk management, compliance assurance and long-term capital planning, while IT maturity has accelerated primarily through cyber resilience, infrastructure standardisation and operational continuity. This uneven maturity profile is important because it suggests trust operating models evolve in response to different organisational pressures, rather than through a single linear model of "more shared services equals more maturity".

The findings appear highly consistent with earlier observations about school trust growth and organisational maturity.[1]

Similar to the growth transitions described in the Greiner organisational growth model, management approaches which work effectively at one stage of growth can become constraints at the next.

Early trust growth was often powered by entrepreneurial leadership, school-to-school collaboration and relatively informal operational arrangements. As trusts expanded, this created increasing pressure for stronger central coordination, professionalisation and operational control. Many of the strongest maturity areas identified in this research – financial control, cyber resilience, estates compliance and workforce governance – reflect precisely these organisational pressures.

However, the research also suggests that many trusts are now approaching a further inflexion point. The next maturity challenge appears less about centralising transactional activity alone and more about developing enterprise capability. Across all four functions, the evidence increasingly points toward the importance of integrated planning, workflow maturity, data interoperability, specialist expertise and trust-wide visibility. Finance is moving from transactional control toward strategic insight and resource planning. HR is evolving from advisory support toward organisational development and workforce strategy. Estates is becoming a strategic resilience and infrastructure function rather than simply premises management. IT is evolving from infrastructure support toward enterprise architecture, cyber governance and digital enablement.

The C-Suite agenda varies with trust size

The maturity challenge presents quite different questions for smaller and medium-sized trusts compared to larger ones.

Smaller trusts are often constrained by capacity and specialist expertise. Comments such as "too small to manage and specialise", "capacity constrained by finance" and "progress is slow due to lack of capacity" appeared consistently across the research. Many now understand what more mature operating models look like, but struggle to sustain the specialist capability required to deliver them consistently. The next phase of maturity increasingly depends on expertise that is expensive, difficult to recruit and difficult to scale, including PedTech and digital strategy, enterprise architecture, estates strategy, systems integration and organisational development.

This creates three broad strategic options. The first is growth, either organically or through merger, enabling greater scale and specialist capability, although this can be uncertain and outside immediate control. The second is selective outsourcing, particularly in specialist operational areas such as cyber security, payroll or estates compliance. However, the strongest outsourced models retain clear internal governance, supplier management and strategic oversight, operating as "intelligent clients" rather than fully outsourced organisations. The third, more emergent route is shared capability between trusts, where specialist expertise is shared without

1 CJK (2025), From seeds of creativity to strategic collaboration - how trust central structures evolve as they grow

requiring full merger.

Larger trusts face a different challenge. The debate is shifting away from whether services should be centralised or devolved, toward how responsibilities, systems and services should be coordinated to operate effectively at scale. The most mature models increasingly combine central standards, specialist expertise and enterprise visibility with local operational flexibility, particularly in areas such as IT architecture, estates compliance, workforce planning and business partnering.

Case studies in this report highlight how these different models are being put in place in practice.

An emerging model for leading practice

A trusts address this opportunity, we are seeing the emerging pointers towards a leading practice model, which we previously discussed as "Shared Services 4.0" operating model: one organisation, many schools. This framework also underpins the CJK CST Leading Practice Masterclass

In this model, central services are no longer viewed primarily as transactional back-office functions, but as integrated professional and technical organisational capabilities designed to improve educational and organisational performance.

The strongest emerging models increasingly combine trust-wide standards, specialist expertise and enterprise visibility with local responsiveness and contextual support. Rather than operating as isolated departments, finance, HR, estates and IT increasingly need to function as coordinated organisational systems.

CJK CST Leading practice Masterclass framework

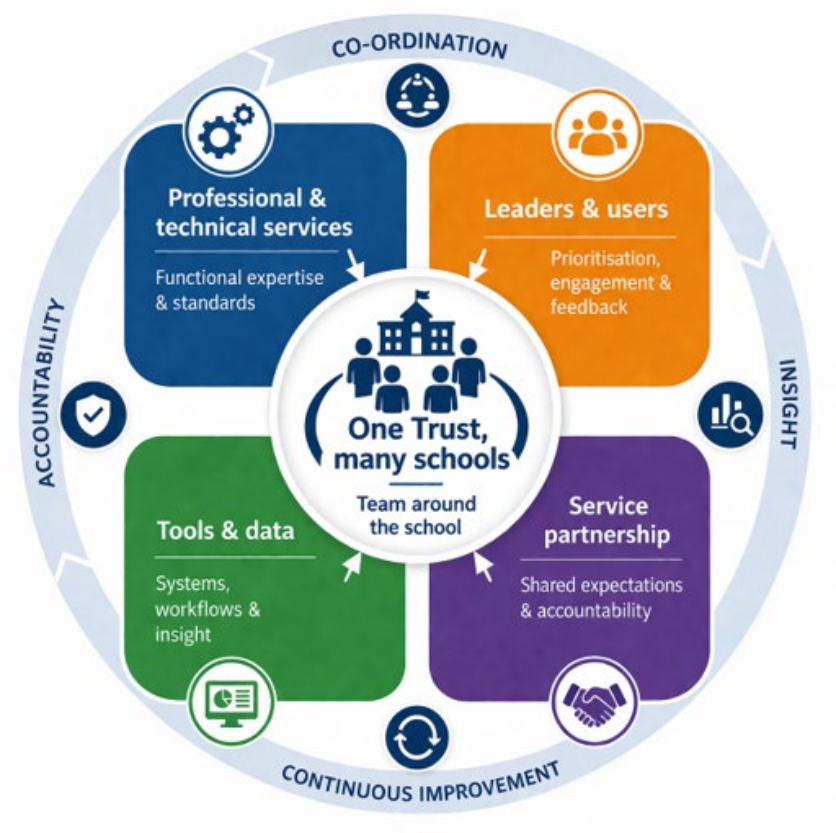
Drives outcomes, not just operations: Services actively improve educational and organisational performance.

Operates as one trust: Removes fragmentation – consistent, scalable, and easier to lead.

Brings expertise to the point of need: "Team around the school" model ensures support is timely, relevant and joined-up.

Turns data into action: Real-time insight shapes decisions, capacity and forward planning.

Replaces transactions with accountability: Shared expectations create ownership, pace and continuous improvement.



Components of leading practice

Effective ways to 'Team around the school'

One of the clearest implications from the research is the growing importance of integrated coordination around schools.

Many of the operational frustrations identified in the qualitative evidence were not caused by the absence of individual services, but by fragmentation between them. Recruitment depends simultaneously on HR, payroll, IT onboarding and

safeguarding checks. Estates projects require coordination between finance approvals, procurement, operational delivery and school leadership. Digital transformation cuts across IT, curriculum, workforce capability and organisational planning.

As trusts mature, the limiting factor is workflow coordination rather than the standalone services themselves. This is where the "team around the school" concept becomes increasingly important.

In more mature operating models, schools interact less with isolated functional silos and more with coordinated trust-wide support teams that combine professional expertise with relationship ownership and local understanding. The aim is clearer accountability, reduced fragmentation and more joined-up professional and expert support.

In practice, this often involves combinations of business partnering, coordinated planning, integrated workflows and clearer operational ownership across functions.

Tools and data

The findings also strongly reinforce the importance of data, systems integration and enterprise architecture. Across all four functions, trusts increasingly possess substantial operational data but often struggle to turn this into joined-up organisational insight.

Finance systems may provide management information but remain weakly integrated with workforce planning or estates utilisation. HR systems frequently support operational processes but provide limited strategic workforce insight. Estates data may exist across multiple systems without providing coherent utilisation or lifecycle intelligence. IT teams often manage significant infrastructure estates while broader digital strategy and interoperability remain underdeveloped.

The challenge for many trusts is therefore no longer acquiring systems, but integrating workflows, establishing reliable sources of truth and converting operational data into better organisational decisions.

Service management

This creates increasing importance for service management disciplines that move beyond traditional transactional measures alone. Some trusts operate 'Service Catalogues' or 'Partnership Agreements', helpdesks and performance measures, but some lack clarity.

Given that 'key performance indicators' can really get in the way of good relationships and a focus on what matters, we see that the strongest versions of these focus on organisational outcomes and user experience, not just operational activity. This includes clearer accountability for workflows, stronger continuous improvement disciplines and greater use of outcome-led measures alongside traditional KPIs.

In practice, this means focusing not only on whether processes were completed, but whether services genuinely enabled schools and leaders to succeed. Examples may include whether new starters are productive on day one, whether estates services minimise operational disruption, or whether digital services reduce workload and improve decision-making.

Overall, the findings suggest trust shared services are entering a more mature and strategically complex phase of development. The first decade of academisation largely focused on establishing compliance, control, and operational consistency. The next phase is focusing on trust-wide capability: integrated planning,

interoperability, resilience, specialist expertise and strategic organisational capacity.

The strongest future operating models are unlikely to be those with simply the largest central teams, but those able to combine specialist expertise, integrated workflows, strong data capability and coordinated organisational support within a coherent trust-wide operating model.

This in turn has profound implications for the nature of professional leadership as trusts mature.



Professional leadership for the next phase of school trust maturity

The findings from this research suggest that trusts are entering a new phase of organisational maturity. Across finance, HR, estates and IT, most trusts now appear to have established the foundations of operational control, compliance and central service delivery. The next challenge is increasingly different: how to lead increasingly complex organisations that depend on coordination across systems, data, services and professional disciplines.

This creates a leadership challenge that goes beyond traditional functional management. The strongest future operating models are unlikely to depend simply on having strong individual departments, but on the ability of executive teams to integrate functions into a coherent organisational model, achieving whole-trust professional leadership.

- Whole-trust thinking alongside functional optimisation
- Data and analytical leadership
- Leading specialist capability
- Service leadership and operational design
- Matrix leadership and the "team around the school"
- Strategic capacity and organisational headroom

1. Trust-wide thinking rather than functional optimisation

One of the clearest themes emerging from the research is that many operational challenges now sit between functions rather than within them. Recruitment depends on HR, payroll, safeguarding and IT onboarding. Estates projects require coordination between finance approvals, procurement, operational delivery and school leadership. Digital transformation increasingly cuts across curriculum, workforce capability, infrastructure and data governance.

This means executive leaders increasingly need to think beyond individual functional optimisation and instead focus on organisational workflows, dependencies and integration. In practice, many trusts are moving from managing departments toward managing eco-systems.

2. Data and analytical leadership

Across operational functions, trusts are increasingly data-rich but insight-poor. Finance functions hold large volumes of operational information but often remain comparatively weak in scenario planning and advanced analytics. HR systems generally support transactions effectively but workforce planning and succession insight remain less mature. Estates functions capture compliance and condition data but often lack strategic utilisation analysis. IT functions manage substantial infrastructure estates while broader digital strategy and PedTech is still developing.

This creates a growing leadership requirement around data governance, interoperability and analytical capability. The challenge is increasingly not whether systems exist, but whether trusts can convert operational data into integrated organisational insight and better decision-making.

3. Leading specialist capability

The next generation of trust maturity depends on specialist expertise that is difficult to recruit, expensive to sustain and often scarce across the sector. Cyber security, enterprise architecture, organisational development, strategic estates planning,

systems integration and workforce analytics all featured repeatedly within the research as capability gaps.

This shifts part of the executive challenge from direct operational management toward capability design. Executive teams increasingly need to determine which capabilities must be owned internally, which can be outsourced and which may be shared or procured collaboratively.

This is particularly important for smaller and medium-sized trusts, where the research repeatedly identified capacity and specialisation constraints. Many trusts now appear to understand what mature operating models look like, but struggle to sustain the expertise required to deliver them consistently.

4. Service leadership and operational design

The findings also suggest increasing importance for service management disciplines that remain relatively underdeveloped in parts of the sector. The strongest models increasingly demonstrate clear workflow ownership, coordinated operational delivery, service catalogues, defined responsibilities and structured performance management. This matters because as trusts scale, informal operating models become increasingly difficult to sustain.

Mature organisations typically rely less on individual heroics and more on clearly designed processes, accountability and continuous improvement disciplines.

Importantly, this does not necessarily imply more bureaucracy. In many cases, the most mature trusts appear to reduce operational friction precisely because responsibilities, workflows and escalation routes are clearer and better coordinated.

5. Matrix leadership and the “team around the school”

The research also reinforces the growing importance of matrix leadership. As trusts become larger and more complex, the traditional debate between centralisation and devolution becomes less useful. Stronger models combine central standards, specialist expertise and enterprise visibility with local flexibility and contextual understanding. This places growing importance on relationship management, influence, coordination and business partnering. In practice, schools require a coordinated “team around the school” rather than disconnected interactions with separate functional silos.

This represents a significant shift in leadership capability. Executive teams need to lead through influence, coordination and shared accountability rather than purely hierarchical control.

6. Strategic capacity and organisational headroom

Perhaps the strongest cross-cutting theme within the research is that many trusts are now constrained less by understanding and more by capacity.

The sector largely understands what mature practice looks like. The challenge is often finding sufficient organisational headroom, specialist expertise and implementation capacity to sustain it. This is likely to become one of the defining leadership questions for the next phase of trust development.

For some trusts, the answer may be growth or merger. For others, selective outsourcing or shared capability models may become increasingly important. However, the underlying leadership challenge remains the same: creating sufficient organisational capacity to move beyond reactive operational management toward strategic organisational development.

Overall, the findings suggest that the next generation of trust leadership is likely

to be defined less by operational control alone and more by the ability to integrate people, systems, services and strategy into a coherent organisational model. The strongest trusts are increasingly distinguished not simply by the quality of individual functions, but by the quality of leadership between them.



About this research

CJK, in partnership with CST, surveyed senior leaders of technical, professional and operational services in school trusts, asking if they are confident that their trust central team fully provides specific services across their trust.

There were c.60-80 such services for each of finance, HR, estates and IT.

We put these into four to six service groups for each function and categorised them each as:

- Core: Ensuring minimum compliance
- Enhanced: Delivering operational advantage through working at scale
- Strategic: Delivers strategic benefits to the trust's overall goals.

We also sought views from respondents about their service aspirations and barriers.

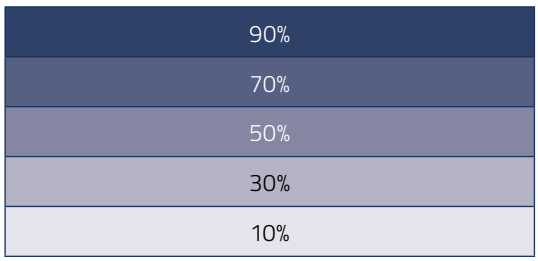
We conducted case studies with trusts which had the highest levels of service coverage to understand how these services had been built, how they worked, and what lessons might be shared with other trusts.

We are grateful to CST for overall support, to IMP Software for supporting the finance section, and to Talent Architects for supporting the development of the people and HR framework.

How to read the report

For each of the areas of finance, HR, estates, and IT we provide an overview followed by a discussion of each service area.

We show the approximate percentage of trusts currently providing each service and at which level, using a 'heat map' approach, with darker colours indicating more trusts operating at that level:



While it might be expected that trusts would progress from core, through enhanced, to strategic the reality is that even within a service area there may be a mix of tasks and processes at different levels.

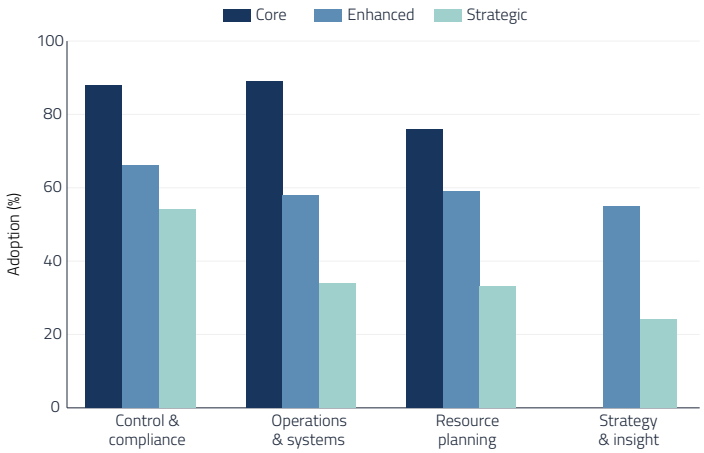
The heatmaps represent the overall percentage of trusts with activity at each category; because trusts were able to indicate service area activity in multiple categories, these will not total to 100%.

Where no trust was operating a service at that level, the relevant grid square is blank.

For brevity we use a summary phrase for each service area. To see the full description that respondents were responding to, see the detailed tables at the end of the report.

Finance

The most mature of the core operational services, but stronger at compliance than strategy.



Finance is the most mature and systematised of the four operational functions reviewed. Core financial controls, statutory reporting, treasury management and budget coordination are now broadly embedded across the sector, with many trusts operating recognisable shared-service finance models.

However, the survey also shows a clear maturity boundary. Trusts are generally strong where activity is mandated, audited or tightly linked to financial control. Adoption falls where activity requires more sophisticated systems integration, automation, workforce modelling, commercial capability or strategic insight.

The qualitative comments suggest this is rarely a lack of ambition. More often, respondents describe constraints of:

- scale
- capacity
- fragmented systems
- organisational readiness

Overall, finance appears operationally mature and increasingly centralised, but not yet consistently insight-led.

1. Strong controls, but limited operational optimisation

The strongest area of finance maturity remains the core control environment. Statutory reporting, audit preparedness, VAT compliance, treasury management and budget coordination all show consistently high adoption rates, indicating that most trusts now operate secure and relatively mature financial stewardship arrangements.

This reflects a function where the compliance requirements are clear, governance expectations are well established, and centralisation has become widely accepted. Finance was frequently described as one of the earliest services to centralise because the operational and regulatory risks of inconsistency were too high.

However, the comments also show that compliance is not the same as efficiency. Several respondents described manual workarounds, underused system functionality and limited operational headroom.

> *"The bank reconciliation is done manually. Our current system supports automated reconciliations, we just don't use this function."*

> *"Senior leaders are spending too much time with the day to day routines and not enough time towards strategic thinking."*

The overall picture is therefore one of strong operational control, but less consistent optimisation and automation.



Service area	Core	Enhanced	Strategic
Financial reporting and statutory compliance	Statutory accounts, DfE returns and management accounts	Commentary and in-year reforecasting	Not applicable
Treasury and cashflow management	Compliant banking, cash controls and reserves policy	Pooled cash and short-term forecasting	Strategic reserves and cashflow planning
Financial controls, scrutiny and audit preparedness	Controls, audit trails and year-end processes	QA and internal scrutiny activity	Assurance insights strengthen governance
Central banking & account management	Trust-wide accounts, signatories and reconciliations	Automated recs and cash pooling	Optimised banking structure and terms
Process automation & workflow optimisation	Not applicable	Automation reduces manual processes and errors	Workflow redesign removes low-value activity

2. Shared finance services are established, but uneven in depth

Enhanced adoption is strongest in budgeting, forecasting and business partnering, suggesting that many trusts now operate recognisable finance shared services with central coordination, standard planning cycles and operational support for schools. The qualitative evidence suggests these models have generally improved consistency, resilience and visibility. Finance teams are increasingly acting as operational partners to schools rather than purely transactional processors.

However, operational maturity is much less consistent in procurement, supplier management and end-to-end workflow integration. Several trusts described finance functions that are centralised for control and reporting, but not yet fully integrated operationally.

> *"Current purchasing and finance system is not fit for purpose."*
>
> *"We don't currently manage our supplier base proactively but are looking at ways to do this."*
>
> *"We've just recruited a procurement and contracts manager to support with managing contracts more effectively."*

Several respondents also linked slower progress directly to capacity and mandate constraints.

> *"Barriers include gaps in FP&A and contract/service supplier management capabilities within the central services. Unclear mandate from trustees/ executives to progress centralisation."*

The evidence suggests that centralisation alone does not automatically create operational maturity or commercial leverage.

Service area	Core	Enhanced	Strategic
Budget planning and forecasting	Budget setting and monitoring	Trust-wide planning and reforecasting	Forecasting informs trust decisions
Business partnering and school support	Not applicable	Finance guidance and support to schools	Finance shapes school and trust decisions
Accounts payable, receivable, and recharging	Core AP/AR and recharge processes	Centralised P2P and income management	Integrated workflows and automation
Contract & supplier management	Not applicable	Supplier oversight and contract visibility	Strategic sourcing and supplier leverage

3. Business partnering has matured faster than strategic insight

One of the clearest patterns in the survey is that business partnering and

operational financial guidance have matured more quickly than advanced strategic insight capability.

Many trusts now provide regular financial guidance, budget support and planning assistance to schools. However, there is a marked drop-off in areas requiring integrated data architecture, advanced analytics, predictive modelling or automated insight generation.

Respondents repeatedly described fragmented systems and limited integration as major barriers to further progress.

> *"Full seamless integration of finance, HR, payroll and education data / systems - no system currently available / aware of that currently achieves this."*

> *"The integration of financial, operational and educational data into dashboards… resource availability is the key barrier."*

Several trusts are actively investing in improvement through Power BI, IMP, workflow tools and integrated reporting systems, but most appear to remain at an early stage of maturity.

> *"Although we have introduced some integrated data dashboards that consolidate data across departments, they are still within their infancy and development."*

The findings suggest that the next phase of finance maturity depends less on compliance and more on the ability to turn operational data into strategic decision-making.

Service area	Core	Enhanced	Strategic
Financial insight for strategic decision-making	Not applicable	Insight supports trust planning	Scenario modelling shapes decisions
Finance dashboards and reporting data	Not applicable	Standard dashboards and reporting	Integrated trust-wide performance insight
Systems and data governance	Finance systems and access controls	Integrated finance systems and data	Strategic data architecture

4. Resource planning and ICFP are valued, but difficult to embed

Integrated curriculum and financial planning is reasonably established at operational level, with many trusts now supporting schools to model staffing costs against curriculum plans and affordability assumptions.

However, the comments suggest that consistent implementation remains difficult, particularly where schools retain strong local autonomy or where curriculum structures are highly variable.

> *"ICFP is done but not in any consistent or measured way and isn't currently streamlined across the trust."*

> *"Embedding ICFP is very difficult in the special sector where curricula are bespoke and needs of students so varied."*

Several respondents also described continuing dependence on central finance teams because school-level financial capability remains uneven.

> *"Training has been put in place… but heavy reliance is still on the central team currently due to lack of knowledge in the schools."*

The evidence suggests that mature workforce planning depends not only on strong finance teams, but also on shared assumptions, school-level capability and stronger integration between educational and financial planning.

Service area	Core	Enhanced	Strategic
ICFP & workforce financial modelling	Not applicable	Staffing-cost and curriculum modelling	Curriculum-financial analytics embedded
Workforce financial capability	Budget-holder training and guidance	School leaders engage with planning	Strong financial literacy across schools

5. Procurement and commercial capability remain underdeveloped

Procurement compliance is relatively well established, but strategic procurement maturity is significantly weaker. While many trusts maintain compliant procurement controls and approval processes, far fewer demonstrate trust-wide category management, consolidated supplier intelligence or commercial optimisation capability.

The comments suggest that procurement often remains operational rather than strategic.

> *"Procurement - resourcing is a barrier though."*
>
> *"Consolidation of all contracts and having a trust wide overview is still required to get the best value for money."*

Several respondents described moves toward preferred suppliers and central oversight, but these appear uneven across the sector.

Overall, finance maturity remains strongest where capability builds directly on traditional control functions, and weakest where it requires new commercial or organisational capability.

Service area	Core	Enhanced	Strategic
Procurement policy & oversight	Compliant procurement policy and controls	Central coordination of procurement	Procurement insight drives value
Income generation & value optimisation	Not applicable	Income streams and commercial activity	Trust-wide income and diversification

6. AI interest is high, but adoption remains cautious

AI generated significant interest despite extremely low adoption levels. Respondents described pilots, experimentation and exploratory automation activity, but very little evidence of embedded AI-enabled finance processes or strategic analytics.

The dominant tone is one of cautious exploration rather than transformational deployment.

> *"We want to harness the use of AI... we continue to investigate and take opportunities."*
>
> *"The simplistic view that AI is an answer in itself is simply not true at the moment."*

Several respondents specifically referenced concerns around governance, data security, internal capability and implementation cost.

The evidence suggests that the near-term opportunity is more likely to be targeted automation and productivity improvement than wholesale transformation of finance operations.

Service area	Core	Enhanced	Strategic
AI augmentation and analytics	Not applicable	AI supports selected assisted finance activity	AI-enabled strategic analytics

7. Capacity, scale and organisational readiness are the dominant constraints

Across all sections of the survey, the same barriers recur consistently:

- limited capacity
- small central teams
- fragmented systems
- inconsistent school-level practice
- lack of organisational scale

These constraints appear repeatedly across both quantitative adoption levels and qualitative responses.

> *"The [limit is] time and resource."*
>
> *"We hope to implement all of the above but capacity and skill set is a barrier." "We are still learning to operate as a trust rather than as separate establishments."*

Several respondents also highlighted cultural and organisational barriers to centralisation and integrated planning.

> *"Schools want to do their own thing and finance is seen as a control."*

The evidence suggests that lower adoption of strategic finance is not generally caused by lack of understanding about good practice. More often, trusts lack the scale, systems, mandate or operational headroom required to move beyond transactional delivery.

Conclusion

The finance function has made substantial progress across the school trust sector. Core compliance, reporting, treasury management and budget coordination are now broadly embedded, and finance is one of the most established shared-service functions.

However, the next phase of maturity is less about strengthening controls and more about improving integration, insight and organisational capability. The strongest trusts are increasingly differentiated not by compliance alone, but by their ability to:

- integrate finance with workforce and curriculum planning
- reduce manual operational activity
- improve systems integration
- use data to support trust-wide strategic decision-making

Finance is operationally strong, but not yet consistently optimised.

Case study: Eight school mixed phase trust

Abbey Multi Academy Trust is an eight school mixed phase school trust. Their CFO highlighted a desire to create a more proactive finance service through skills, systems and insight.

Key insights

- Set a clear team vision linked to trust strategy
- Use centralisation to specialise and build capacity
- Turn finance insight into earlier, more challenging conversations

"Finance can be stuck. You have to be open to new ideas, look at risk, and think differently about how skills and capacity can be used."

"Linking the team's goals to the trust strategy helps people feel connected to what the trust is trying to achieve."

How the trust established the conditions for a strategic finance service

The trust has used the flexibility of its centralised model to reshape finance around schools' needs and team skills, rather than historic job roles. Instead of recreating broad finance manager posts that mixed school-facing support with operational delivery, it created clearer reporting, operations and procurement hubs so people could focus where they add most value.

This has sharpened focus, ownership and capacity within the team. It has also helped the trust develop and retain staff in a difficult recruitment market, supported by apprenticeships and professional qualifications.

Systems and data have been critical enablers. The trust has a strong in-house ticketing system across central functions, is embedding KPIs and developing its wider data architecture, including Power BI dashboards, data lakes and advanced reporting tools. The move from to a new finance system also creates an opportunity to further simplify processes, strengthen reporting and build a clearer digital roadmap.

Impact so far

With stronger foundations in place, finance now helps leaders look further ahead, act earlier and maintain control. Reporting is more closely linked to risk, highlighting key pressures, what has changed and where action is needed.

This is supporting more challenging conversations with schools. Supply overspends, for example, are not simply reported; finance asks what is driving the pressure, what is being done, and whether resources need to be redirected.

Procurement insight is also improving value and efficiency. A small procurement hub, supported by specialist external input, gives the trust better data on contracts, spend and supplier performance, strengthening value for money, social value and contract management.

Reserves and treasury management are being used more strategically. Stable reserves are invested to support schools, with stronger cashflow planning, ethical investments and a more diversified portfolio. The team is also challenging banks on service, returns and facilities.

What's next?

The next phase is to continue building financial confidence across the trust. Aspiring leaders training will help school leaders think more strategically about finance, understand how resource decisions link to education priorities, and take greater ownership of long-term sustainability.

Case study: 16 school mixed phase trust

Red Kite Learning Trust is a 16 school mixed phase trust. Its commercial director explained its approach to using operational maturity to unlock strategic and commercial value.

Key insights

- Get core finance operations working smoothly first
- Turn operational efficiency into strategic capacity
- Use commercial thinking to strengthen sustainability

"Get operations humming like a sewing machine. Otherwise it's hard to be strategic."

"ICFP should help leaders understand their options; the tail shouldn't wag the dog."

How the trust established the conditions for a strategic finance service

The trust has strengthened strategic finance by first getting the operational basics working well. Procure-to-pay processes are now well embedded, with workflow systems supporting expenses, credit cards and other transactions. This has improved efficiency, reduced payment times and meant new schools can join the trust without a matching increase in transactional finance staff.

Monthly reporting is also much slicker. Clearer expectations, better communication and a "reverse SLA" with schools mean management accounts can be issued by day 10, provided stakeholders have completed their part of the process. This creates the discipline needed for timely reporting and frees capacity for more value-added work.

Procurement has also matured significantly. A dedicated procurement role, external specialist support and participation in a procurement excellence programme have helped the trust develop a clearer procurement strategy, strengthen compliance and improve value for money.

Impact so far

With stronger processes in place, finance has more capacity to support strategic conversations. Benchmarking is used more actively to inform challenge, compare performance and support honest discussions about options available to schools.

ICFP is becoming a more important part of the finance conversation. The trust has focused on helping leaders understand the benefits of ICFP and use it as a way of exploring choices, rather than allowing the numbers to drive decisions in isolation.

Finance also supports sustainability through stronger cash management, monitored on a daily basis, and through more commercial thinking. Trading income is significant, supported by a trading subsidiary and wider activity across teacher training, NPQs, CPD, conferences, sponsorship, adult education, sports centres, lettings, catering and procurement frameworks.

What's next?

The next phase is to build further on the trust's entrepreneurial activity. Alongside its core schools, the trust is developing wider education, commercial and procurement-related income streams, while continuing to strengthen ICFP, benchmarking and strategic conversations with leaders.

Case study: Four school mixed phase trust

Transforming Lives Educational Trust is a four school mixed phase trust. Its CFO described an approach of building confidence to support better decisions.

Key insights

- Get the basics working well first
- Use systems and team structure to create capacity
- Understand the school context deeply

"We needed people to trust the numbers, so they could rely on them without checking them again. That created the space to move from explaining the past to looking ahead."

"Understanding how staffing works is huge. It's what enables the right conversations with school leaders, where finance and education can each bring something valuable."

How the trust established the conditions for a strategic finance service

The finance function now plays a more strategic role because it first focused on the fundamentals. The initial priority was to create reliable numbers, smooth processes, and financial information that leaders could trust.

This meant strengthening core finance routines, improving the quality and timeliness of reporting, and building confidence through clean audit outcomes. As trust in the numbers has grown, finance conversations have become less focused on checking information or explaining the past, and more focused on looking ahead and supporting better decisions.

Systems have been a key enabler. The trust has moved from an manual finance system to Sage, giving greater control and consistency. Forecasting was developed through Excel then moved to IMP, making the process slicker. The value of these systems has not simply been efficiency, but creating more time and capacity for value-added work.

The finance team structure has also been reshaped. Rather than team members supporting individual schools across a range of tasks, responsibilities have been organised around specific process areas. This has given clearer focus, ownership and accountability.

Using finance insight to support sustainable decisions

The finance team recently worked closely with a secondary school with falling pupil numbers and increased sixth form competition to establish a more sustainable long-term model and better use of resources for. Finance modelled pupil numbers, class sizes, subject choices, staffing and sixth form viability, showing where the curriculum offer needed to change. This gave leaders the evidence to make informed decisions about curriculum breadth, staffing and resource deployment, while supporting wider thinking about sixth form growth and shared resources across the trust.

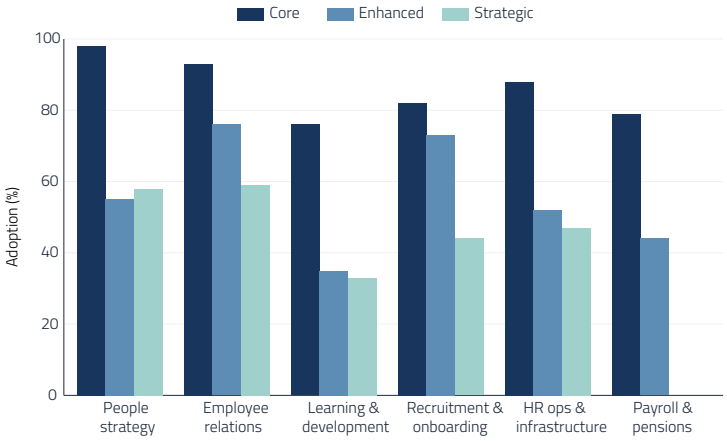
What's next?

The next phase is to help budget holders take greater ownership of financial decisions, supported by slicker purchase-to-pay processes and a stronger understanding of how staffing, curriculum, and spending choices affect sustainability.

People

Evolving from transactional HR administration toward trust-wide organisational and workforce leadership.

HR across the school trust sector appears to be at a different stage of maturity to finance. The evidence suggests a function that is operationally less systematised, but increasingly influential in organisational strategy, culture and workforce sustainability.



The strongest adoption is concentrated around:

- employee relations
- recruitment compliance
- onboarding
- restructures
- payroll assurance

However, maturity falls significantly in:

- workforce planning
- leadership development
- succession
- HR systems
- service infrastructure

The overall picture is of a function evolving from transactional administration toward trust-wide organisational and workforce leadership.

In contrast to the finance maturity path, trusts appear to have progressed further with the organisational and cultural aspects of people and HR, while lagging in systems integration, service infrastructure and automation.

1. Employee relations and organisational risk management are maturing and increasingly centrally led

Employee relations and organisational risk management appear to be among the more mature HR capabilities across the sector.

Core adoption is consistently high across formal casework, restructures, TUPE, union consultation, and HR advisory support. Enhanced and strategic maturity is also comparatively strong in workforce change and trade union engagement, suggesting that many trusts increasingly view HR as a trust-wide organisational risk and change function rather than purely an advisory service.



Trust growth, organisational complexity and workforce pressures have driven substantial professionalisation and centralisation in this area.

> *"We are a fully centralised HR transactions and business partner team."*

However, maturity remains uneven. Some trusts continue to rely heavily on school-level delivery or relatively small HR teams managing high operational workloads.

> *"Some of these responsibilities remain at school level as*

the HR function is not centralised."

Employee relations is one of the more mature areas of HR shared services, although operational capacity and inconsistent centralisation continue to constrain some trusts.

Service area	Core	Enhanced	Strategic
HR advice and casework triage	HR advice and staff issue triage	Central case allocation and escalation	Not applicable
Investigations and formal casework	Disciplinary and capability processes	Consistent trust-wide ER management	Not applicable
Workforce change	TUPE and restructure processes	Trust-led workforce change delivery	Restructuring supports trust strategy
Trade unions and collective matters	Statutory consultation and union processes	Trust-level union relationship management	Collaborative strategic union partnerships

2. Recruitment services are increasingly centralised, but hybrid models are common for highly dynamic activity such as contractor checks

Recruitment operations appear relatively mature and increasingly operationalised through central trust teams. Adoption is particularly high in onboarding, safer recruitment checks, contract management and recruitment administration.

The qualitative evidence suggests many trusts have moved beyond setting recruitment policy centrally. For substantive employees, central HR teams are increasingly delivering operational onboarding processes directly, including DBS and right-to-work checks, SCR entry, contract generation, onboarding workflows, and compliance assurance.

However, the comments also reveal an important operational distinction. While permanent employee onboarding is often substantially centralised, supply staff, agency staff and contractors frequently remain managed through hybrid local models because of the highly dynamic nature of day-to-day operational updates.

"The people team do all the checks, and enter starters on the SCR. The schools maintain the SCR on a daily basis... and people team quality check termly."

Recruitment administration and safer recruitment are increasingly mature shared services, with many trusts now operationalising substantial elements centrally rather than only governing them.

Service area	Core	Enhanced	Strategic
Recruitment delivery	Recruitment process and interview support	Central ATS and recruitment workflows	Recruitment aligned to workforce planning
Safer recruitment and pre-employment checks	DBS and compliance checks	Trust-wide QA and SCR management	Not applicable
Offers, contracts and onboarding	Contracts and onboarding support	Standardised onboarding and induction	Not applicable
Hard-to-fill roles and immigration	Immigration and complex recruitment	Talent pools and shortage campaigns	Overseas recruitment support models

3. Workforce planning and organisational development remain underdeveloped

One of the clearest maturity gaps within HR is workforce planning and organisational development.

Many trusts appear to recognise the strategic importance of workforce planning and leadership pipelines, but relatively few have embedded trust-wide systems linking curriculum planning, financial planning, succession, and workforce capability.

Leadership and succession planning is particularly notable. Despite increasing recognition that leadership capacity is becoming a major growth constraint, only around a third of respondents report mature trust-wide approaches. This is further complicated by the relationship between people/ HR Services and Teaching School Hubs, which are typically led by the education team and focused on the teaching workforce.

"About to commence work on workforce planning, aligned with curriculum and financial planning."

"This is the area of focus for next year - an OD strategy."

"Work being developed on succession planning for leadership and more work around apprenticeships including effective use of the levy."

"Barriers have been capacity and reactive work."

Strategic workforce planning and organisational development are increasingly recognised priorities, but remain among the least mature HR capabilities across the sector.

Service area	Core	Enhanced	Strategic
Workforce planning	Not applicable	Trust-wide workforce capacity planning	Integrated workforce and curriculum planning
Learning and development pathways	Not applicable	Career and CPD pathways	Leadership pipelines and succession
Leadership and succession	Not applicable	Not applicable	Trust-wide leadership succession planning
Apprenticeship levy	Not applicable	Coordinated levy management	Levy supports long-term capability

4. HR is increasingly shaping culture, identity and organisational strategy

HR shows pockets of maturity in organisational and cultural leadership. Strategic adoption is particularly high in people strategy, workforce architecture, workforce change, and industrial relations. Many trusts increasingly see HR as central to organisational identity, leadership behaviours, workforce sustainability and employee proposition.

However, for other trusts this remains an emerging direction rather than fully embedded maturity. Several respondents described work that is in development, partially implemented, or dependent on future operating model change.

"Working on the people strategy."

"Need to be able to support the trust more in its strategic direction around workforce planning, recruitment, retention and wellbeing."

"[We want to fill gaps in] organisational development, pay and reward strategy, and enhancing line manager capabilities."

The evidence a function in transition. HR is increasingly expected to shape culture, organisational design, and strategic workforce capability, but many trusts are still building the operational infrastructure and leadership capacity required to support those ambitions consistently.

Service area	Core	Enhanced	Strategic
People strategy and workforce architecture	Policies and compliant HR structures	Trust-wide frameworks and operating model	People strategy shapes trust direction
Pay, reward, and grading	Consistent pay and conditions	Trust-wide grading consistency	Reward strategy supports recruitment and retention

5. HR operational infrastructure and systems maturity are inconsistent

Many trusts have compliant HR administration and records management, but far fewer operate mature HR service infrastructure. Compared with finance, HR appears significantly less systematised. Adoption falls materially in areas such as workflow standardisation, service management, systems integration and management reporting. The low enhanced adoption for SLAs, KPIs, service catalogues and continuous improvement frameworks is particularly notable.

Many trusts appear to operate HR services through relatively informal arrangements rather than fully structured shared-service models. At the same time, strategic expectations of HR continue to rise. This creates a growing tension between the increasingly strategic role expected of HR and the underlying capacity, systems, reporting and service-management capability supporting delivery.

"No HR system, which limits data available."

"We need to develop SLAs and KPIs, this is under review."

HR operational infrastructure remains uneven, with many trusts operating compliant administration but less mature systems, reporting and service-management capability.

Service area	Core	Enhanced	Strategic
HRIS and data governance	HR records and GDPR compliance	Central HRIS and self-service	Workforce insight and dashboards
Employee lifecycle administration	Joiners, leavers and contract changes	Streamlined trust-wide processes	Not applicable
Service management and assurance	Audit and compliance reporting	SLAs, KPIs and service catalogues	HR service supports trust resilience
Supplier management	Not applicable	Management of key HR suppliers	Not applicable

6. Payroll is operationally stable, but integration is a pain-point and analytical ownership can sometimes be fragmented

Payroll appears comparatively mature operationally, with strong adoption across payroll support, payroll assurance, pensions administration, and statutory payment processes. Most trusts have established reliable payroll processing arrangements, whether delivered internally, through finance teams, or via outsourced and local authority providers.

However, the comments reveal a recurring set of operational frustrations around fragmented HR and payroll integration, manual reconciliation, duplicated data entry, reporting limitations, and responsiveness from external providers.

These issues appear less about payroll compliance itself, and more about workflow efficiency, interoperability and systems maturity.

The evidence also suggests payroll frequently sits organisationally outside HR ownership. This creates an important analytical consideration: ensuring payroll data

supports both financial planning, and wider workforce and people strategy.

"No integration between HR and payroll systems."

"Provided externally so responsiveness can sometimes be difficult."

"Significant reliance on spreadsheets."

Payroll across the sector appears generally stable and compliant operationally, but integration and interoperability remain common pain points. It could be put to more strategic use, especially workforce planning.

Service area	Core	Enhanced	Strategic
Payroll processing	Accurate payroll and statutory deductions	Integrated HRIS-payroll workflows	Not applicable
Payroll controls and assurance	Payroll controls and audit trails	Central handling of complex scenarios	Not applicable
Pensions administration	TPS/LGPS processing and returns	Complex pension case handling	Not applicable
Payroll support	Payroll query support for schools	Not applicable	Not applicable

Conclusion

HR is becoming strategically important faster than it is becoming operationally mature.

The HR and people function across the school trust sector appears to be undergoing a significant transition. Core compliance activity is now broadly mature, particularly in employee relations, restructures and TUPE, safer recruitment, onboarding and payroll assurance.

Many trusts have also moved well beyond policy-setting alone. Recruitment administration, onboarding and substantial elements of safer recruitment are increasingly being operationalised through central trust teams rather than left entirely to schools. At the same time, strategic expectations of HR are rising rapidly. Trusts increasingly expect people functions to support organisational culture, workforce sustainability, leadership pipelines, retention, wellbeing, organisational design and trust growth.

However, the operational infrastructure supporting these ambitions remains uneven. Compared with finance, HR appears significantly less systematised, with weaker maturity in HR systems integration, service management, workflow automation, management information, workforce analytics and organisational development capability. The differing maturity paths of finance and HR may partly reflect the different capabilities schools historically possessed prior to academisation. Finance maturity was accelerated by the rapid transfer of corporate accountability and regulatory scrutiny to trusts, while HR inherited stronger traditions in organisational leadership, professional development and workforce culture. Employee relations appears to have matured particularly quickly as trusts became the direct employer of staff and sought greater organisational consistency across multiple schools.

Whereas HR system immaturity has been coped with through workarounds, goodwill and tolerance of weaker data.

The evidence suggests the next phase of HR maturity is likely to depend less on compliance and more on building organisational development capability, integrating workforce, curriculum and financial planning, improving HRIS and payroll interoperability, strengthening management information and service infrastructure,

and creating sufficient operational capacity for HR teams to move beyond reactive delivery.

Overall, HR appears strategically ambitious and increasingly central to trust operating models, but many trusts are still building the systems, scale and organisational capacity required to deliver that ambition consistently.

Case study: Three secondary academies and a sixth form college

The trust's director of People and Culture spoke of creating a consistent, data-led people service that addresses workforce issues earlier.

Key insights

- Create the right conditions for successful change
- Establish a consistent employee experience across all schools
- Combine workforce insight with regular professional support to address issues earlier

"You've got to map the processes first; the software comes after that."

"Give plenty of time and investment to stakeholder engagement."

Establishing the foundations for a strategic people service

Independent review of the function provided additional evidence to support the move from a fragmented legacy model towards a central professional people service.

The trust began by mapping and standardising core processes before configuring SamPeople, supported by dedicated implementation capacity. Recruitment was addressed first, followed by other processes in turn. The approach sought to maximise consistency while retaining necessary flexibility to reflect differences in terms and conditions between the schools and the sixth form college.

Representatives from every academy helped design the new processes, ensuring they reflected day-to-day practice. This took time but helped build ownership and ensured the approach aligned with the trust's wider culture.

Two HR business partners now give schools regular access to professional expertise, not only when significant employee relations issues arise.

Consistent processes, the gradual rollout of new HRIS modules and short, practical training sessions have helped managers build their confidence and capability.

Technology has enabled employee self-service, providing a more consistent and accessible experience across the trust.

Impact so far

Trustees now receive trust-wide workforce metrics, while academy leaders review a monthly scorecard with their HR business partner covering absence, turnover, DEI, appraisal completion and emerging employee relations concerns. These discussions help leaders identify and manage workforce issues earlier.

Staff survey comments indicate that employees find the digital service easier to use.

The professionalised model provides a more scalable foundation for growth

and may be attractive to schools or trusts considering a merger. A small group of primary schools is expected to join the trust during the autumn term.

These stronger foundations have made it easier for the trust to prepare for and respond to the forthcoming changes associated with the Employment Rights Act.

What's next?

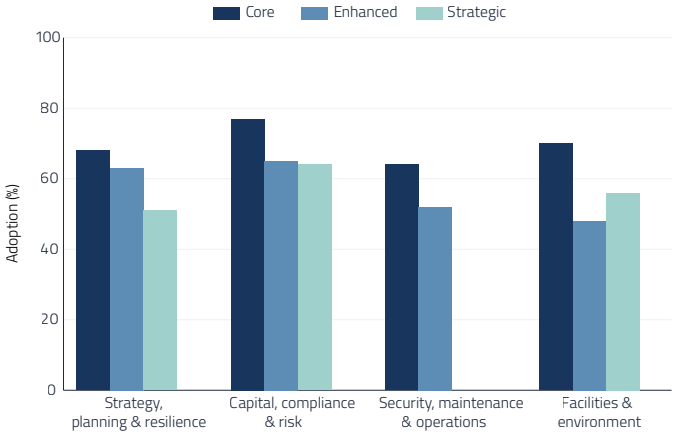
Roll out the single central record module within SamPeople.

Develop a more coherent organisational development approach, bringing together learning and development, support-staff development, and pay and reward.

Continue to review and refine processes, systems and service delivery, recognising that the development of an effective people service requires ongoing improvement.

Estates

The function is maturing in operational compliance and risk, and in strategy, but more slowly in terms of full shared operational services



The estates function appears to be maturing along two distinct but related paths: operational compliance and risk assurance; and strategic estate portfolio management.

The strongest and most consistent maturity remains in statutory compliance, health & safety, fire safety, capital delivery, and estates risk management.

This suggests trusts have prioritised centralisation first in areas carrying the greatest safeguarding exposure, legal accountability, and operational risk.

At the same time, a significant proportion of trusts are now developing more strategic estates capability, particularly in lifecycle planning, risk-based backlog management, resilience, and estate strategy.

This indicates that for many school trusts, estates is increasingly being viewed not simply as an operational support service, but as a strategic organisational asset.

However, operational industrialisation remains uneven. Compared with finance, and in some areas HR, estates functions appear less systematised operationally, with lower maturity in helpdesk coordination, workflow infrastructure, service management, local site management and operational consistency. This is driven less by resistance to centralisation and more by specialist capacity constraints, implementation bandwidth and limited access to professional estates expertise. Sustainability maturity is emerging pragmatically rather than ideologically. Many trusts appear focused on: energy efficiency, environmental management and operational resilience, before committing to fully developed net-zero strategies.

Overall, the evidence suggests estates is evolving from a primarily reactive premises-management function toward a strategic portfolio, resilience, and organisational planning capability; although maturity remains highly dependent on trust scale, specialist expertise and operational capacity.

1. Compliance and statutory assurance are the most mature estates capabilities

The strongest and most consistent estates maturity appears in areas linked to statutory compliance, safeguarding, operational risk and legal accountability.

This mirrors the finance maturity pattern, where functions with immediate regulatory consequences matured first and most consistently. However, unlike finance, estates compliance remains operationally hybrid in many trusts. Central teams typically oversee, assure, prioritise, and commission works, while operational delivery frequently remains distributed across local academy site teams and contractors.

The qualitative evidence suggests this is not generally due to resistance to centralisation, but because trusts have prioritised limited capacity toward the areas carrying the highest safeguarding and compliance exposure.



"Would like to centralise most aspects. Barriers have been capacity, capability of previous post holders, budget limitations..."

"Capacity across the central team..."

"Most of the rest is work in progress, but progress is slow due to lack of capacity"

Compliance and statutory assurance appear to form the operational foundation of most school trust estates functions, with centralisation driven primarily by risk concentration and safeguarding accountability.

Service area	Core	Enhanced	Strategic
Building compliance and statutory assurance	Statutory building compliance	Trust-wide compliance assurance	Not applicable
Health and safety compliance	Health and safety compliance	Not applicable	Not applicable
Fire safety management	Basic fire safety management	Trust-wide fire safety oversight	Not applicable
Estates risk management and prioritisation	Risk-based estates prioritisation	Enhanced estate risk management	Not applicable

2. Strategic estates capability is emerging, but remains highly capacity constrained

A significant minority of trusts now appear to be moving beyond reactive estates management toward strategic asset planning, lifecycle optimisation, portfolio management and long-term estate resilience. This is one of the clearest "trust dividend" maturity areas within the estates function. The evidence suggests larger or more mature trusts increasingly view the estate as a strategic organisational asset, rather than simply a collection of operational sites.

However, the qualitative evidence also suggests many trusts are still in relatively early stages of developing these capabilities. Strategic estates maturity appears heavily dependent on access to specialist expertise, implementation capacity and cross-functional planning capability.

Several respondents also highlighted that advanced estates planning increasingly requires integration beyond traditional estates management. Capacity and utilisation analysis, for example, was described as requiring educational planning and timetabling expertise not always available within central estates teams.

"Sustainability strategy developed but not rolled out fully."

"Capacity/utilisation analysis requires input from education leads and timetabling expertise not present in central team."

"Asset and BIM modelling, time constraints."

Strategic estates capability is increasingly emerging within the sector, but maturity remains highly dependent on specialist expertise, organisational scale and implementation capacity.

Service area	Core	Enhanced	Strategic
Trust-level estates strategy	Not applicable	Not applicable	Trust-wide estates strategy
Capital strategy and lifecycle planning	Not applicable	Lifecycle planning support	Strategic capital and lifecycle planning
Risk-based condition and backlog planning	Not applicable	Not applicable	Risk-based backlog planning
Capacity and utilisation analysis	Not applicable	Not applicable	Estate utilisation and capacity analysis

3. Full shared service models are less common than in other services, and industrialisation of operational services remains uneven

Some trusts operate full operational estates shared services, particularly in areas such as estates procurement, maintenance coordination, reactive repairs, contractor management and planned preventative maintenance.

However, operational maturity appears notably less systematised than finance and, in some areas, less mature than HR. While operational activity is increasingly centralised, the evidence suggests many trusts still rely on informal coordination, semi-manual processes and fragmented operational workflows.

This is particularly visible in the relatively low maturity of estates helpdesks, coordination infrastructure and incident response processes.

It is more normal in estates than other services for local based staff to also be locally line managed, therefore centrally managed capacity is smaller. The main constraint is not lack of strategic intent, but operational capacity, staffing structures, specialist availability and implementation bandwidth.

The overall picture is of a function that has developed significant operational coordination capability, but which has not yet fully industrialised workflow, service management and systems infrastructure.

"Progress is slow due to lack of capacity"

"Budget limitations, current staffing structures"

Capacity limits delivery of other services"

Full shared service models are less common than in other services, and workflow industrialisation and service-management maturity remain uneven and capacity constrained.

Service area	Core	Enhanced	Strategic
Planned preventative maintenance	Not applicable	Trust-wide planned maintenance	Not applicable
Reactive and emergency repairs	Not applicable	Central reactive repair coordination	Not applicable
Day-to-day site operations	Not applicable	Operational estates coordination	Not applicable
Estates helpdesk and coordination	Basic estates coordination	Structured helpdesk and workflow	Not applicable

4. Estates is increasingly linked to organisational resilience and safeguarding

The evidence suggests estates is viewed not simply as premises management, but as organisational resilience infrastructure. Maturity is particularly strong in areas linked to safeguarding, site security, continuity planning and operational resilience.

The relatively high strategic maturity in business continuity and resilience is particularly notable. This suggests some trusts are increasingly integrating estates into trust-wide risk management, crisis preparedness, and organisational resilience planning.

At the same time, the lower maturity of operational incident-response infrastructure suggests many trusts are still developing the operational systems and coordination capability required to support fully mature resilience models.

"Business continuity arrangements are developing trust-wide."

"Security and safeguarding requirements have become increasingly important."

"Current staffing structures limit some operational resilience activity."

Estates is increasingly evolving into a core organisational resilience and safeguarding function, extending well beyond traditional maintenance activity.

Service area	Core	Enhanced	Strategic
Business continuity and resilience	Not applicable	Not applicable	Trust-wide resilience planning
Physical safeguarding and site design	Not applicable	Physical safeguarding and site design	Not applicable
Site security and access control	Site security and access control	Not applicable	Not applicable
Incident and emergency response	Not applicable	Incident response coordination	Not applicable

5. Sustainability maturity is pragmatic and operationally focused

Sustainability maturity across the sector appears pragmatic rather than ideological. While relatively few trusts report fully mature net-zero strategies, a much larger proportion appear to be developing operational energy management, environmental monitoring, energy audits and phased sustainability activity. The evidence suggests many trusts are prioritising practical operational improvements, cost reduction, and estate efficiency, before making large-scale strategic net-zero commitments. This distinction is important. The comments indicate that some trusts view formal net-zero commitments cautiously where funding, technological feasibility, or operational delivery pathways remain uncertain. The result is a maturity profile where operational environmental management is developing faster than fully institutionalised sustainability strategy. This appears operationally grounded and financially pragmatic rather than resistant to sustainability itself.

"We have a trust level sustainability strategy but this does not include a commitment to net zero as there is currently no achievable path for schools to do this."

"We are currently developing our Climate Action Plan and also undertaking various energy audits to inform our sustainability and NZ strategy."

"The trust level sustainability & net-zero strategy are in progress."

Sustainability capability is emerging steadily across the sector, although many trusts currently appear focused on operational energy management and practical delivery rather than formalised net-zero commitments.

Service area	Core	Enhanced	Strategic
Sustainability and net-zero strategy	Not applicable	Not applicable	Net-zero and sustainability strategy
Energy and environmental management	Not applicable	Not applicable	Operational energy and environmental management
Soft FM contract management	Not applicable	Soft FM contract management	Not applicable

6. Estates maturity appears highly dependent on organisational scale and specialist capability

Estates appears to be one of the most unevenly mature functions across the sector.

The evidence suggests significant variation between highly strategic, professionally led estates functions and highly devolved operational coordination models.

This variation appears strongly linked to trust size, estate complexity, growth activity, capital exposure, and access to specialist expertise. The qualitative evidence repeatedly references limited specialist capacity, implementation constraints, and reliance on developing capability over time. Unlike finance, where many core technical capabilities rapidly became universal requirements, estates maturity appears much more dependent on whether trusts have developed professional estates leadership, strategic portfolio capability, and sufficient organisational scale to sustain specialist expertise.

This may explain why some strategic estates capabilities show relatively strong adoption, while operational service infrastructure remains uneven elsewhere.

> *"Our main constraint is capacity across the central team..."*
>
> *"We lack capability in Asset and BIM modelling, and we have severe time constraints."*
>
> *"Most of the rest is work in progress"*

Estates maturity appears highly scale-sensitive and specialist-dependent, with the strongest maturity emerging where trusts have developed professionalised central estates capability beyond traditional site-management models.

Conclusion

Estates functions are evolving from operational maintenance toward strategic estate stewardship

The estates function across the sector appears to be evolving from reactive premises management toward more strategic estate stewardship. Core maturity is strongest in areas linked to statutory compliance, safeguarding and operational risk, particularly health and safety, building compliance, fire safety and estates risk management. As with finance, the highest maturity appears where failure carries immediate organisational consequences.

However, estates delivery often remains operationally hybrid, with central teams overseeing assurance and prioritisation while local site teams and contractors continue to deliver significant operational activity in most trusts.

At the same time, a growing proportion of trusts are developing more strategic estates capability. Stronger adoption in lifecycle planning, backlog management, resilience and trust-level estate strategy suggests many trusts increasingly view the estate as a strategic organisational portfolio rather than simply an operational support service. The evidence also indicates that mature estates planning increasingly intersects with educational planning, sustainability, safeguarding and organisational resilience, requiring broader specialist expertise than traditional site-management models alone.

Operational industrialisation, however, remains uneven. Compared with finance, and in some areas HR, estates functions appear less systematised operationally, with weaker maturity in workflow coordination, helpdesk infrastructure and service management. The qualitative evidence suggests this reflects capacity and specialist expertise constraints more than resistance to centralisation itself. Many respondents described ambitions for greater consistency and central coordination, but characterised progress as constrained by staffing structures, implementation capacity and funding pressures.

The findings also suggest sustainability maturity is developing pragmatically

rather than ideologically. Many trusts appear focused first on operational energy management and practical delivery before making formal net-zero commitments.

Overall, estates appears to be becoming a more strategic, portfolio-focused and resilience-led function, although maturity remains highly dependent on trust scale, specialist capability and access to professional estates leadership.

Case study: 24 school primary trust

The trust's Head of Operations & Estates explained their approach to rebuilding a leaner, locally-empowered estates model.

Key insights

- Strip back central layers, push budget and accountability to site level
- Central team shifts to audit, assurance and specialist support rather than doing everything itself
- Cluster hubs and regular training build peer support and site manager capability

"Site managers are now able to feel a part of the school again – 'this is my school', and the pride that goes with that."

"Headteachers and managing expectations – the importance of the estates work that goes on behind the scenes. Budget realisation... enables meaningful conversations can be had."

How the trust rebuilt its estates operating model

The trust moved from two estate managers and two regional managers to a much smaller central team (head of facilities, a deputy and two admin), with site managers based in every school and line-managed jointly between heads and the centre.

Cost savings were part of the driver, but so was recognising the old model wasn't working – too many layers separated schools from decisions, and site staff had little sense of ownership over "their" building.

The central team has been reshaped into an audit and assurance function, overseeing compliance and supporting rather than delivering day-to-day estates work itself, with budgets and real responsibility handed to site managers.

Impact so far

It is early days – some things are still being missed – but central audit and oversight are keeping delivery on track while local ownership beds in.

Site managers report feeling genuinely part of their school for the first time, rather than being kept at arm's length from projects affecting their own buildings.

A weekly cluster-hub structure lets site teams (carpenters, plumbers, painters and more) share skills and cover for each other, backed by a termly training and communication forum.

What's next?

As the new structure settles, focus turns to building consistency across the estate.

Headteachers are being helped to understand they are accountable, not personally responsible, for day-to-day site operations – with budget

conversations central to making that distinction real.

The trust would like one additional central role to make the leaner model work even more effectively.

Case study: 40 school trust

The trust's estates director outlined their work building a data-led strategic estates function from a standing start

Key insights

- Move from ad hoc, subjective decisions to a data-led, condition-survey-based estates function
- Hybrid model: local site teams for day-to-day; regional/central management for contracts, compliance and strategic planning
- Pooled central budgets for reactive and lifecycle maintenance stop essential work being crowded out

"Data... makes decisions objective, less subjective. Easier for schools to accept decisions that give way to a greater need."

"Comms and bringing along schools and heads with you" is described as the biggest challenge – understanding what heads can and can't take on.

How the trust built a strategic estates function

When the current estates director joined eight years ago there was no dedicated estates capability – it was handled informally by the operations team, with SCA bids the only real planning tool and no condition surveys or evidence base for investment decisions.

Within a year the trust moved away from school business managers overseeing estates alongside everything else, creating specialist regional teams and, from 2019, the estates function as it operates today.

The current hybrid model keeps premises staff in schools but line-manages them through four regional managers; cleaning, catering and all planned preventative maintenance are centralised, with mechanical and electrical outsourced to a facilities provider.

Impact so far

Health and safety and building compliance have moved from inconsistent, informally-juggled activity to a monitored, measurable system, backed by a dedicated H&S specialist appointed in 2020.

Condition-survey data makes investment decisions objective rather than subjective, making trade-offs easier for schools to accept in favour of trust-wide priorities.

Central oversight has created room for cross-cutting work individual schools couldn't tackle alone – including a trust-wide overheating strategy and centrally-purchased energy, with solar and LED rollouts under way.

What's next?

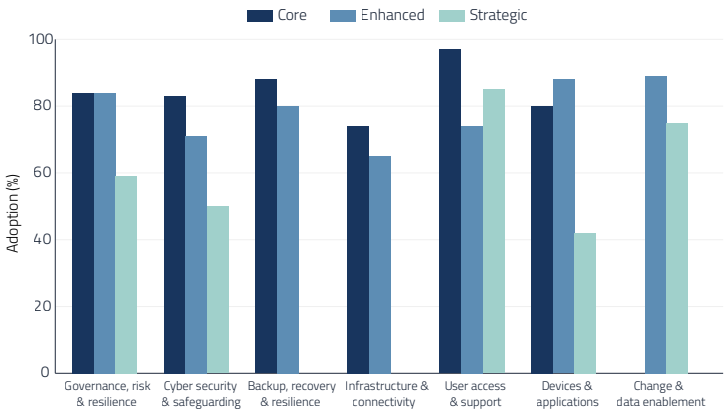
Procurement is the next big focus: committing to building-works contracts several years ahead to capture economies of scale, rather than relying on frameworks the trust doesn't feel offer strong value.

Planned preventative maintenance compliance and head accountability for estates remain areas to strengthen, alongside a sustainability agenda constrained by the technical limits of older buildings.

The trust would welcome stronger sector-wide tools for condition data and project management, and clearer DfE leadership on shared issues such as asbestos.

Information technology

Evolving from resilience and support toward digital and enterprise leadership, but constrained by scale, specialism and inheritance



The IT function across the trust sector appears comparatively mature in operational resilience, cyber security and core infrastructure management. The strongest adoption is concentrated in areas such as user access control, backup and recovery, vulnerability management, incident handling and cyber governance, suggesting trusts increasingly view IT as a core organisational risk and continuity function rather than simply a technical support service.

However, the evidence also suggests many trusts remain in a "standardisation before optimisation" phase. Enhanced maturity is generally stronger than strategic maturity across infrastructure, architecture and operational support, indicating that many school trusts are still focused on consolidating inherited systems, reducing fragmentation and establishing consistent technical standards across schools.

Strategic digital capability is emerging, but unevenly. Areas such as digital strategy, data enablement, automation and AI show growing interest but lower adoption, with many respondents describing these capabilities as still developing. The qualitative evidence repeatedly identifies specialist capacity, implementation bandwidth and funding constraints as major barriers to further maturity.

Overall, the findings suggest IT functions are evolving from infrastructure and support teams toward broader digital, cyber and enterprise architecture leadership, although maturity remains highly dependent on organisational scale and specialist capability.

1. Cyber security and operational resilience are now among the most mature IT capabilities

The strongest and most consistent IT maturity across the sector appears in cyber security, operational resilience and risk containment. High adoption in backups, incident escalation, endpoint protection, identity controls and cyber monitoring suggests trusts increasingly view cyber resilience as a core organisational risk-management function rather than simply a technical concern.

Enhanced maturity is also comparatively strong in areas such as vulnerability scanning, phishing simulation, cyber awareness and penetration testing. This suggests many trusts are now moving beyond minimum technical controls toward more active and continuous cyber-risk management. However, comments suggest this maturity is a staged journey constrained by cost, specialist staffing and operational practicality, and remains uneven where advanced tooling, specialist expertise or continuous monitoring capability are required.

> *"Cyber essentials accreditation is the next stage for our trust." "We're currently evaluating SIEM and EDR/XDR systems." "External penetration testing - cost."*
>
> *"Cyber essentials IMHO does not work for schools. Mainly*



due to MFA requirements for ALL users."

Cyber security and operational resilience now appear among the most mature and fastest-developing areas of IT shared services across the school trust sector.

Service area	Core	Enhanced	Strategic
Perimeter and identity security	Core cyber and identity protection	Enhanced threat monitoring and controls	Strategic cyber oversight
Access and data protection	Core access and data protection	Enhanced identity and data controls	Trust-wide data protection strategy
Backup and recovery	Backup and disaster recovery	Enhanced recovery and resilience	Not applicable
Incident preparedness	Cyber incident preparedness	Enhanced incident management	Not applicable

2. Many trusts remain in a "standardisation before optimisation" phase of IT maturity

Many trusts are still focused primarily on consolidating infrastructure, standardising systems, improving visibility and reducing inherited technical fragmentation. 'Enhanced' adoption is consistently stronger than 'strategic' adoption across infrastructure, connectivity, technical architecture, asset management and operational support.

Trusts described inherited environments with mixed platforms, inconsistent standards, fragmented infrastructure and varying school-level approaches.

Many trusts are still progressing through a maturity stage focused on establishing common architecture, standard operating models and consistent technical governance before moving toward more advanced digital transformation capability.

"We still operate on a server at each school and a combination of Google and Microsoft logins."

"Software can be like the wild west across the trust."

"We aim to take a more centralised approach in future. We need to create the architectural blueprint first."

Many school trusts appear to be progressing through a necessary "standardisation before optimisation" phase, where infrastructure consistency and technical governance remain higher priorities than advanced digital transformation.

Service area	Core	Enhanced	Strategic
Governance and assurance	Core governance and technical assurance	Trust-wide standards and assurance	Not applicable
Connectivity risk	Core connectivity management	Enhanced network standardisation	Not applicable
Physical and network infrastructure	Infrastructure and network management	Enhanced trust-wide infrastructure standards	Not applicable

3. Strategic digital capability is emerging, but many IT functions remain infrastructure-led

One of the clearest maturity boundaries within IT is the transition from operational infrastructure management toward strategic digital leadership. Many trusts now operate increasingly mature cyber governance, infrastructure oversight and operational IT coordination capabilities. However, adoption falls materially in areas requiring trust-wide digital strategy, pedagogical technology leadership, automation,

AI governance and integrated data capability.

Several trusts described digital strategy, AI and data capability as "in development", dependent on future recruitment or constrained by competing operational priorities.

> *"Digital and pedagogical strategy is a work in progress." "We are just about to recruit a Digital Director."*
>
> *"AI [is a next step] as we don't have a finished policy yet."*

The IT function across the sector appears to be evolving from operational infrastructure management toward broader digital leadership, although strategic maturity remains uneven and emerging.

Service area	Core	Enhanced	Strategic
Trust IT risk and oversight	Operational IT risk management	Trust-wide IT oversight	Strategic digital leadership
Digital direction	Not applicable	Not applicable	Trust digital strategy
Automation and AI	Not applicable	Not applicable	Automation and AI strategy

4. Capacity and organisational scale are major constraints on IT maturity

Across almost all areas of the survey, respondents repeatedly referenced limited staffing, funding pressures, implementation bandwidth and insufficient specialist capacity.

The evidence suggests IT may be one of the most scale-sensitive operational functions within school trusts. While many trusts can establish minimum operational controls, significantly fewer appear able to sustain specialist cyber capability, integration expertise, architecture leadership, project delivery capacity and strategic digital development simultaneously.

The qualitative evidence also suggests smaller trusts often rely heavily on generalist IT staff, outsourced providers or operational prioritisation, which can constrain longer-term digital transformation activity.

> *"Capacity, I feel our trust and therefore team are too small to manage and specialise."*
>
> *"We need to grow before we can justify the funding of a second person in the central IT team."*
>
> *"Manpower!"*

IT maturity appears highly dependent on organisational scale, specialist staffing and implementation capacity, creating significant variation across the sector.

Service area	Core	Enhanced	Strategic
IT change delivery	Not applicable	Trust-wide IT change delivery	Not applicable
Communications platforms	Not applicable	Trust-wide communications platforms	Not applicable
Vulnerability management	Core vulnerability management	Enhanced vulnerability management	Not applicable

5. Data integration, systems visibility and architecture remain major maturity gaps

One of the most important structural maturity gaps within IT relates to systems integration, trust-wide visibility, architecture consistency and data interoperability.

The qualitative evidence repeatedly references fragmented systems, inconsistent processes, reporting limitations and incomplete integration between operational platforms.

This appears particularly important because weak integration capability potentially constrains the maturity of finance insight, workforce planning, safeguarding analytics and trust-wide reporting more broadly.

The findings therefore suggest IT maturity increasingly depends not only on infrastructure capability, but on the ability to establish integrated digital architecture, reliable data flows and organisation-wide systems interoperability.

> *"We lack visibility at trust level of data."*
>
> *"Historic procedure failures in embedding systems (e.g. asset tracking)." "Data sharing and actioning with our trust HR team and MIS systems." "We are trying to standardise data processes across the trust."*

Systems integration and data architecture appear to be among the most strategically important – and least mature – aspects of IT capability across the school trust sector.

Service area	Core	Enhanced	Strategic
Asset visibility and control	Core asset visibility and control	Enhanced asset management	Strategic asset and data visibility
Data enablement	Not applicable	Trust-wide data coordination	Strategic data enablement
Software and patching	Core software and patch management	Enhanced patching and lifecycle management	Not applicable

6. Outsourcing and MSP dependency create both resilience and control tensions

Outsourced IT delivery and MSP partnerships remain strategically significant across the sector for some trusts, especially small to medium-sized, providing operational resilience, specialist expertise and delivery capacity that would otherwise be difficult to sustain internally.

However, the comments also reveal recurring tensions around visibility, strategic control, architecture consistency, supplier alignment and cyber accountability, where operational delivery is partly outsourced.

> *"We lack visibility over the necessary detail ... given that the trust outsources our IT delivery to a Managed Service Provider."*
>
> *"Ensuring we align our IT MSP with our own cybersecurity strategy."*

MSP and outsourced delivery models remain operationally important for some trusts, but require strong trust-side governance, architecture and cyber oversight capability.

Conclusion

From infrastructure and cyber resilience toward digital and enterprise leadership

The IT function across the school trust sector appears to be evolving beyond its traditional role as an operational support service. Core maturity is now strongest in areas linked to cyber security, operational resilience, identity management and infrastructure continuity, with particularly high adoption in backup and recovery, user access control, incident preparedness and vulnerability management. This suggests trusts increasingly view IT as a core organisational risk and continuity function rather than simply a technical service.

At the same time, many trusts appear to remain in a "standardisation before optimisation" phase. The evidence suggests significant effort is still focused on consolidating inherited infrastructure, reducing fragmentation and establishing consistent technical standards across previously autonomous schools.

Strategic digital capability is emerging, particularly in areas such as data enablement, automation, AI and digital strategy, but adoption remains uneven and frequently constrained by specialist capacity, implementation bandwidth and funding pressures.

The qualitative evidence also highlights growing tension between operational delivery and strategic digital leadership. Some trusts rely on MSPs and outsourced support while simultaneously seeking greater control over architecture, cyber governance, systems integration and trust-wide visibility.

Overall, IT maturity appears highly dependent on organisational scale, specialist expertise and the ability to move from infrastructure management toward integrated digital and enterprise leadership.

The next phase of IT maturity across the school trust sector is likely to depend less on infrastructure stabilisation alone and more on integrated architecture, data interoperability, digital leadership and strategic technology governance.

Case study: Six school primary trust

Prince Regent Street Trust is a six school primary trust. The Chief Operating Officer described their approach as "small trust, enterprise thinking".

Key insights

- Standardise wherever possible, differentiate where it matters
- Use outsourcing strategically, not as a substitute for leadership
- Build common workflows before pursuing automation

"One senior voice across the trust to give a unified request for all IT requirements."

"Our 'Office in a box' enables resilience, efficiency and quality."

Creating capacity through strategic outsourcing

Prince Regent Street Trust operates six primary schools across Teesside, serving very different communities and contexts. The trust outsources IT, payroll, attendance, education welfare and HR support. Even the COO role is contracted in. This provides specialist expertise, resilience, capacity and affordability that would be difficult for a trust of this size to sustain internally.

The trust's IT provision is fully outsourced through a regional provider. This gives access to specialist capability while allowing trust leaders to focus on strategy, operating models and organisational improvement. Outsourcing has not meant giving up control: the trust provides a clear strategic voice and common set of requirements across the schools, allowing suppliers to operate within a coherent trust-wide framework.

Building an "office in a box"

The trust has standardised business processes wherever possible. While schools retain agency over curriculum and delivery where needed, the underlying organisational infrastructure is increasingly common across the trust.

This includes shared systems and processes for finance, payroll, HR,

safeguarding, school administration and admissions. Common approaches are being established for onboarding, offboarding, assessment frameworks and SEND provision mapping. The "office in a box" model means schools can be supported consistently, staff can move between settings more easily and trust leaders have greater visibility of performance and risk.

Processes are increasingly delivered through the workflow automation built into Arbor MIS, further reducing time and the risk of error.

The trust has established a trust-wide approach to AI, bringing together curriculum and operational leaders to evaluate approved tools and establish common standards. The focus is on identifying practical use cases that improve classroom practice and organisational efficiency while maintaining appropriate governance and compliance.

What's next?

The next phase is to deepen integration between systems, processes and data with further workflow automation, and to strengthen its AI strategy by linking technologies to curriculum standards and operational improvement. The approach enables a small trust to access many of the benefits typically associated with much larger organisations.

Detailed tables: Finance

Financial control and compliance

Service area	Core	Enhanced	Strategic
Financial reporting and statutory compliance	Produce compliant statutory accounts, DfE returns (AAR), and monthly management accounts shared with trustees in line with the ATH.	Provide clear commentary on management accounts and routine in-year reforecasting.	Not applicable
Treasury and cashflow management	Maintain compliant banking, cash controls and reserves policy to ensure liquidity.	Centrally manage pooled cash and short-term forecasting to optimise in-month balances.	Use reserves and cashflow forecasting strategically to maximise returns and support long-term investment planning.
Payroll processing and compliance	Deliver accurate payroll and statutory deductions (PAYE, pensions, HMRC).	Link payroll to budget and forecasts through regular reconciliation, with clear commentary and analysis.	Use payroll analytics to inform trust-wide staffing decisions and workforce optimisation.
VAT accounting and submissions	Complete accurate VAT returns and maintain compliance with HMRC.	Automate VAT processes and improve accuracy through systems integration.	Use VAT insight to maximise allowable recovery and advise on VAT-efficient treatment of trading subsidiaries, recharges and business/non-business activities.
Financial controls, internal scrutiny and audit preparedness	Maintain strong financial controls, segregation of duties, documentation, audit trails and year-end processes that meet ATH and audit requirements.	Strengthen assurance through regular QA and internal scrutiny activity, identifying issues early and improving control effectiveness.	Use audit and assurance insights to strengthen governance, mitigate systemic risks and drive continuous improvement.
Central banking and account management	Operate trust-wide bank accounts with approved signatories, reconciliations and delegated authority compliance.	Implement automated reconciliations and cash pooling.	Optimise banking structure and terms to support liquidity, investment and risk appetite.
Financial due diligence (new schools / mergers)	Conduct mandatory financial due diligence in line with the ATH and Board requirements regarding new schools/ mergers.	Apply a consistent due-diligence framework across all growth decisions.	Integrate due-diligence insights into long-term trust growth, risk and investment strategy.
Fixed-asset and capital accounting	Maintain an accurate fixed-asset register and comply with capital accounting rules, with planning and oversight of capital projects.	Improve capital planning with clear data, regular condition updates and consistent oversight.	Use trust-wide estates and capital insight to prioritise investment, optimise long-term asset strategy and support future growth.
Finance leadership capability and qualifications	CFO appointed and appropriately qualified/ experienced for the trust's scale.	CFO professionally qualified and supported by a structured, professionally developing finance team.	Active finance talent pipeline and succession planning is in place.

Financial operations and systems

Service area	Core	Enhanced	Strategic
Budget planning and forecasting (operational)	Coordinate statutory trust-level budgets and DfE submissions.	Support schools with detailed budget planning, monitoring and in-year reforecasting.	Align forecasting with curriculum and workforce planning to deliver sustainable staffing and deployment models.
Accounts payable, receivable and service recharging	Ensure timely and accurate payment of suppliers and collection of income.	Centralise P2P and income management to improve consistency and control.	Use transaction data to inform efficiency, benchmarking and commercial strategy.
Business partnering and school support	Not applicable	Provide clear financial guidance, analysis and support to school leaders and budget holders.	Ensure financial insight shapes school and trust decision-making, supporting leaders to make confident, well-informed resource and planning choices.
Contract and supplier management	Not applicable	Manage supplier contracts and monitor service performance.	Use aggregated supplier intelligence for strategic sourcing and risk management.
Process automation and workflow optimisation	Not applicable	Implement automation to reduce manual processes, errors and administrative workload.	Redesign processes to remove low-value activity through integrated digital workflows.
Systems and data governance	Maintain finance-system access controls, master-data governance and change-control processes.	Integrate financial systems and strengthen data standards, ownership and quality.	Develop strategic data architecture enabling predictive analytics, interoperability and scalable digital capability.
Finance dashboards and reporting data	Not applicable	Provide consistent dashboards and KPIs giving leadership a clear view of financial performance.	Integrate financial, operational and educational data into unified dashboards that support trust-wide insight.

Resource planning and management accounting

Service area	Core	Enhanced	Strategic
Procurement policy and oversight	Maintain and enforce compliant procurement policy and controls aligned with ATH and the Procurement Act.	Coordinate purchasing centrally to secure value, supplier consistency and proportionate effort to risk.	Leverage procurement data to drive trust-wide savings, innovation, interoperability and sustainability.
ICFP and workforce financial modelling	Not applicable	Support schools to model staffing costs against curriculum plans.	Embed curriculum-financial analytics in trust-wide strategic and budgeting processes.
Workforce financial capability (school staff)	Provide essential training so budget holders understand processes, roles and responsibilities.	Develop consistent financial capability across schools with standard tools, training and regular support.	Build strong financial literacy across schools, enabling confident, data-driven decisions with reduced reliance on the central team.

Strategy development and insight

Service area	Core	Enhanced	Strategic
Financial insight for strategic decision-making	Not applicable	Provide financial analysis to inform medium-term planning.	Use financial insight to model demographic, income, cost and investment scenarios to support long-term trust strategy and risk planning.
Income generation and value optimisation	Not applicable	Support schools in identifying and managing local income streams.	Develop trust-wide strategies for income diversification and commercial growth.
AI augmentation and analytics	Not applicable	Use AI tools to streamline processes and provide individually tailored outputs.	Apply AI to transform workflows, generate autonomous insights and enhance decision quality.
Sector engagement and external representation	Not applicable	Participate in external finance networks and benchmarking groups.	Influence sector policy and share best practice to strengthen the trust's position.

Detailed tables: People and HR

People strategy and organisational capability

Service area	Core	Enhanced	Strategic
People strategy and workforce architecture	Maintain compliant HR policies, lawful pay structures, and standard job descriptions, including equality, diversity and inclusion compliance.	Trust-wide workforce planning frameworks, JE processes, benefits structures and a defined HR operating model with embedded EDI principles.	People strategy actively shapes trust strategy, growth and organisational design, including shared culture, values and the trust's employee value proposition (career deal).
Pay, reward and grading	Lawful pay structures and consistent application of terms and conditions.	Centralised pay review processes and trust-wide grading consistency.	Pay and reward strategy used deliberately to support recruitment, retention and affordability trade-offs.
Workforce planning	Not applicable	Deliver trust-wide workforce planning and capacity modelling.	Use workforce insight, aligned to curriculum and financial planning, to anticipate shortages, risks and future capability needs.

Employee relations and workforce management

Service area	Core	Enhanced	Strategic
HR advice and casework triage	Provide HR advice, helpdesk support and initial triage of staff issues.	Centralised triage and allocation of cases by risk and complexity.	Not applicable
Absence management	Manage routine and long-term absence in line with policy and employment law.	Trust-wide absence frameworks, reporting and proactive monitoring.	Absence insight used to address systemic workload, wellbeing and leadership issues.
Investigations and formal casework	Manage investigations, disciplinary, grievance, capability and dismissal processes lawfully.	Central management of moderate and high-risk cases with consistent processes and templates.	Not applicable
Workforce change (restructure, redundancy, TUPE)	Deliver lawful consultation, redundancy and TUPE processes when required.	Trust-led coordination of complex or multi-school workforce change.	Restructure used deliberately to enable trust sustainability and long-term strategy.
Trade unions and collective matters	Meet statutory consultation and collective Trades Union obligations.	Proactive trust-level union engagement and relationship management.	Collaborative and formal partnership working with trade unions, fostering positive and constructive relationships.

Learning, development and organisational capability

Service area	Core	Enhanced	Strategic
Mandatory and statutory training	Deliver and monitor statutory and mandatory staff training.	Not applicable	Not applicable
Induction	Deliver trust-wide compliance induction for new starters.	Consistent induction toolkits supporting local academy onboarding.	Trust-wide induction that connects new starters to trust vision, values and ways of working.
Learning and development pathways	Not applicable	Trust-wide career and CPD pathways for teaching and support staff, including line-manager development.	L&D aligned to trust priorities, leadership pipelines and succession planning.
Leadership and succession	Not applicable	Not applicable	Trust-wide and consistent development of people and team leadership skills, behaviour expectations and succession planning.
Apprenticeship levy	Not applicable	Planned and coordinated use of the apprenticeship levy.	Apprenticeships used deliberately to build long-term trust capability and reduce recruitment risk.

Recruitment, onboarding and workforce supply

Service area	Core	Enhanced	Strategic
Recruitment governance and approvals	Approve new and replacement roles and maintain model job descriptions.	Not applicable	Not applicable
Recruitment delivery	Deliver recruitment processes, advertising and interview support.	Centralised ATS, advertising and agency management.	Recruitment and talent acquisition strategy aligned to workforce planning and EVP, including proactive pipeline development (e.g. ITT, ECT and early-career routes).
Safer recruitment and pre-employment checks	Complete DBS, right-to-work checks and maintain an accurate SCR.	Trust-wide QA, audits and training for safer recruitment.	Not applicable
Offers, contracts and onboarding	Issue compliant offers and contracts and support onboarding.	Standardised onboarding frameworks and local induction support.	Not applicable
Hard-to-fill roles and immigration	Support immigration and complex recruitment cases.	Proactive campaigns to build talent pools for hard-to-fill and shortage roles.	Trust-wide recruitment, onboarding and support models for overseas teachers where deliberately adopted.

HR operations and service infrastructure

Service area	Core	Enhanced	Strategic
HRIS and data governance	Maintain accurate HR records, secure access and GDPR compliance.	Central HRIS with standard processes, manager and employee self-service.	HR data and dashboards support workforce insight, risk management and increased ownership by managers.
Employee lifecycle administration	Administer joiners, movers, leavers, contracts, variations and family leave.	Streamlined, trust-wide employee lifecycle processes reducing school burden.	Not applicable
Service management and assurance	Provide HR data for audit, scrutiny and compliance purposes.	HR and People Service catalogues, SLAs, KPIs and continuous improvement.	HR service performance demonstrably supports trust outcomes and organisational resilience.
Supplier management	Not applicable	Manage critical HR-related third-party suppliers.	Not applicable

Payroll and pensions

Service area	Core	Enhanced	Strategic
Payroll processing	Deliver accurate payroll, statutory deductions and on-time pay.	Integrated HRIS–payroll workflows reducing errors and rework.	Not applicable
Payroll controls and assurance	Apply payroll checks, sign-off, audit trails and segregation of duties.	Central handling of complex payroll scenarios.	Not applicable
HMRC and payments	Handle HMRC submissions, BACS payments and payroll journals.	Not applicable	Not applicable
Pensions administration	TPS/LGPS administration, returns and adjustments.	Centralised handling of complex pension cases.	Not applicable
Payroll support	Respond to payroll queries from academies and schools.	Not applicable	Not applicable

Detailed tables: Estates

Strategy, planning, and resilience

Service area	Core	Enhanced	Strategic
Trust-level estates strategy	Not applicable	Not applicable	Develop a trust-level estates strategy aligned to growth and educational priorities
Sustainability and net-zero strategy	Not applicable	Not applicable	Develop a trust-level sustainability and net-zero strategy for the estate
Asset data and Asset Management Plan	Maintain an Asset Management Plan and accurate estate floor and site plans	Not applicable	Not applicable
Estate performance and benchmarking	Not applicable	Not applicable	Analyse and manage estate cost and performance data (e.g. utilities, R&M per m²) to target improvement and inform budget decisions
Capacity and utilisation analysis	Not applicable	Not applicable	Analyse estate capacity and utilisation to inform long-term planning
Academy-level estates planning	Not applicable	Deliver academy-level strategic estates and development planning	Not applicable
Business continuity and resilience	Not applicable	Not applicable	Develop and maintain estates-related business continuity planning

Capital investment, compliance and risk

Service area	Core	Enhanced	Strategic
Capital project development and delivery	Develop capital project business cases and supervise delivery	Deliver project management and contractor oversight	Not applicable
Capital strategy and lifecycle planning	Not applicable	Deliver estate lifecycle planning and manage preferred supplier arrangements	Develop a 3–5 year estates capital strategy aligned to SCA, DFC and other funding
Estates tendering and procurement support	Not applicable	Deliver estates-led tendering, contractor selection and procurement support for works and services	Not applicable
Risk-based condition and backlog planning	Not applicable	Not applicable	Apply risk-based methodologies to prioritise capital investment and remove high-risk condition
Building compliance and statutory assurance	Ensure statutory building compliance and inspection reporting	Deliver compliance programmes and remedial work planning	Not applicable
Health and safety compliance	Ensure statutory health and safety compliance, risk assessments, incident reporting, mandatory training and first aid provision	Not applicable	Not applicable
Fire safety management	Hold fire drills and maintain baseline fire safety compliance	Ensure fire risk assessments are current and actions completed	Not applicable

Security, maintenance and site operations

Service area	Core	Enhanced	Strategic
Site security and access control	Ensure secure access arrangements including locking, CCTV and alarms	Not applicable	Not applicable
Physical safeguarding and site design	Not applicable	Provide advice on physical safeguarding, access routes, fencing, car parks and deliveries	Not applicable
Planned preventative maintenance	Not applicable	Deliver planned preventative maintenance programmes	Not applicable
Reactive and emergency repairs	Not applicable	Deliver reactive and emergency repair works, including vandalism repairs	Not applicable
Day-to-day site operations	Not applicable	Manage routine site operations including opening and closing, porterage, refuse and presentation	Not applicable
Incident and emergency response	Not applicable	Manage estates-related call-outs, spill response and severe weather response	Not applicable
Grounds maintenance	Not applicable	Deliver hard and soft grounds maintenance across all sites	Not applicable
Estates helpdesk and coordination	Ensure estates issues are logged and prioritised appropriately	Deliver a central estates helpdesk to receive, allocate and track issues	Not applicable

Quality assurance, facilities and environment

Service area	Core	Enhanced	Strategic
Quality assurance and site standards	Ensure baseline cleanliness and site safety standards	Carry out QA audits (visitor view) covering cleaning, grounds, buildings and presentation	Not applicable
Estates risk management and prioritisation	Undertake routine site risk assessments	Use risk insight to prioritise estates activity and investment	Not applicable
Cleaning services	Not applicable	Deliver cleaning services and manage waste collection and disposal	Not applicable
Catering services	Not applicable	Deliver catering services including equipment maintenance and compliance support	Not applicable
Soft FM contract management	Not applicable	Manage soft facilities contracts, performance and quality assurance	Not applicable
Lettings administration and delivery	Not applicable	Manage lettings, documentation, pricing and compliance	Not applicable
Energy and environmental management	Not applicable	Not applicable	Manage energy use, audits, adverse weather planning and waste reduction initiatives

Detailed tables: Information technology

Governance, risk, and resilience

Service area	Core	Enhanced	Strategic
Trust IT risk and oversight	Maintain trust-level visibility of material IT and cyber risks affecting the trust	Define and maintain a trust-wide cyber security strategy	Set and maintain a trust-wide IT strategy aligned to organisational priorities
Resilience and continuity	Maintain trust-level awareness of disaster recovery and continuity arrangements for critical systems	Support and maintain academy-level disaster recovery and continuity planning	Not applicable
Governance and assurance	Support and assure IT-related governance, risk management and DPIA processes	Define and maintain a compliant IT technical architecture aligned to DfE standards	Not applicable
Digital direction	Not applicable	Not applicable	Set and evolve a digital and pedagogical technology strategy
Automation and AI	Not applicable	Not applicable	Define and lead an AI and automation strategy for organisational improvement

Cyber security and safeguarding controls

Service area	Core	Enhanced	Strategic
Perimeter and identity security	Ensure firewall and perimeter security risks are managed for trust-connected systems	Monitor and analyse security events and threats	Assess and manage cyber security risk across third-party suppliers
Access and data protection	Ensure identity, access controls and MFA are in place for trust-owned systems	Apply and manage encryption and data protection controls	Lead and maintain Cyber Essentials or equivalent accreditation
Endpoint protection	Ensure endpoint protection is in place for trust-owned devices	Undertake internal vulnerability scanning and testing	Not applicable
Incident preparedness	Maintain an escalation route for serious cyber security incidents	Run and analyse phishing simulations and user testing	Not applicable

User access, support and service continuity

Service area	Core	Enhanced	Strategic
Incident handling	Ensure there is a defined route for incident escalation affecting trust systems	Provide and maintain self-service guidance and knowledge bases	Service desk performance analysis and reporting
User access control	Ensure user access is controlled for trust-owned systems	Provide and manage remote and third-party technical support (3rd line)	Not applicable
Identity lifecycle	Ensure leaver access is removed from trust systems in a timely manner	Provide and coordinate specialist technical support (4th line)	Not applicable

Backup, recovery, and technical resilience

Service area	Core	Enhanced	Strategic
Backup and recovery	Ensure backups and recovery arrangements exist and are tested for critical systems	Commission and manage external penetration testing	Not applicable
Vulnerability management	Ensure vulnerabilities and patching risks are managed for trust-owned systems	Deliver and monitor cyber security training and awareness programmes	Not applicable

Infrastructure, connectivity, and platforms

Service area	Core	Enhanced	Strategic
Connectivity risk	Ensure connectivity risks to trust operations are identified and managed	Manage and optimise network routing and switching	Not applicable
Physical and network infrastructure	Maintain visibility of hosting and storage arrangements for trust-owned systems	Maintain and upgrade cabling infrastructure	Not applicable
Safeguarding systems	Not applicable	Manage and monitor internet filtering and safeguarding systems	Not applicable
Communications platforms	Not applicable	Manage and support telephony and unified communications systems	Not applicable

Devices, applications, and teaching technology

Service area	Core	Enhanced	Strategic
Asset visibility and control	Maintain minimum visibility of trust-owned IT assets	Maintain and reconcile hardware asset inventories	Design and manage middleware and systems integration architecture
Software and patching	Ensure patching and update risks are managed for trust-owned systems	Manage and optimise software licences and compliance	Not applicable
Classroom technology	Not applicable	Support and maintain classroom AV and teaching technology	Not applicable
End-user equipment	Not applicable	Manage and support printing and managed print services	Not applicable
Peripheral devices	Not applicable	Support and maintain peripheral devices	Not applicable

Change, investment, and data enablement

Service area	Core	Enhanced	Strategic
Capital and estates interface	Not applicable	Provide IT input to estates-led capital projects and developments	Plan and optimise lifecycle investment in IT capital assets
IT change delivery	Not applicable	Deliver and manage IT projects for new systems and services	Not applicable
Data enablement	Not applicable	Support and enable data, analytics and reporting teams	Enable and improve data integration and data quality across the trust

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